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axiUm Kiosk Application

129414 - Wording change in message box
Module: axiUm Kiosk (previously called the axiUm Patient Sign-In application)
Problem: Need to rename the window title from axiUm Kiosk Settings to axiUm Kiosk Config.
Solution: Renamed the window title to axiUm Kiosk Config.

129539 - The executable file looks for old file *.ini file names
Module: axiUm Kiosk (previously called the axiUm Patient Sign-In application)
Problem: When we renamed the Kiosk configuration program from KioskSetup.exe to KioskConfig.exe, we also renamed the .ini files used by the Kiosk (axium.ini became KioskConfig.ini and axiumdb.ini became KioskConfigDb.ini). However, when you run Kiosk.exe, it still looks for the old file names, and because they no longer exist, axiUm displays instructions to run the Kiosk Config program instead of launching the Kiosk application.
Solution: The Kiosk has been changed to look for the correct *.ini file names.

134355 - Cannot display copyright
Module: axiUm Kiosk (previously called the axiUm Patient Sign-In application)
Problem: When you open the KioskConfig.exe file, and then you go to the Actions menu and click the About option, axiUm displays the ObjectWindows Exception window.
Solution: Fixed so that in the above scenario, axiUm no longer displays the ObjectWindows Exception window.

134968 - Appointment slip displays incorrect appointment
Module: axiUm Kiosk Application
Problem: When you initially open the Kiosk Application, the first patient sign-in will display the incorrect patient. This occurs if the configuration settings are set up as Print Slip on Patient Sign In = Preview only.
Solution: Fixed so that in the above scenario, the appointment details of the correct patient displays in preview mode.
Chart Tracker

127940 - AUTOLOCK obsolete fields removed
Module: Chart Tracker ~ Electronic Locks
Problem: Two fields in the AUTOLOCK table are obsolete (MaxChartsOut and MaxHoursOut).
Solution: Removed MaxChartsOut and MaxHoursOut from the AUTOLOCK table.

130097 - Incorrect status when denied consent
Module: Chart Tracker ~ Electronic Locks
Problem: Chart requests display the incorrect status when required consent is denied.
For example, when the chart request status is ‘P’ (needs consent), and the consent is denied, the status no longer displays ‘P’.
Solution: Fixed so that in the above scenario, the correct status displays.

131904 - User names containing apostrophes cause SQL error
Module: Chart Tracker ~ Chart Out window
Problem: If a user’s name contains an apostrophe (’)(e.g. O’Neil), and you try checking out a chart for this user (with no submitted chart request), axiUm displays an SQL error.
Solution: Fixed so that in the above scenario, axiUm no longer displays the SQL error.

133152 - Lost the ability to send charts with no user
Module: Chart Tracker ~ Chart Out window
Problem: In previous versions, if the Location Codes window (in Maintenance window - Office tab - Location icon) has a location record with the Charts Go To drop-down field displaying the Location Area option, you can go to the Chart Out window (in Chart Tracker window - Chart Out button) and send charts to that location without specifying a user. axiUm lost this ability, and you are forced to specify a user.
Solution: Fixed by restoring the ability to send charts to a location with no user specified in the Chart Out window.

133234 - Text box not disabled when ellipsis is disabled
Module: Chart Tracker ~ Chart Out window
Problem: When the Charts To Go Location is Location Area (Maintenance window - Office tab - Location icon - Location Codes window), and the ‘Chart Out Without Override’ check box is selected in the Chart Out window, the ellipsis is disabled but the User Login box is not disabled.
**Solution:** Fixed so that in this scenario, the User Login text box is disabled.

---

### 133510 - Chart requests re-appearing after chart-out

**Module:** Chart Tracker - Chart Request tab

**Problem:** If you check out a chart, axiUm removes the chart request record from the list view, and this is fine. However, if you then modify the associated appointment (e.g. change the discipline), the chart request returns to the Chart Request tab.

*Note:* The Patient Card window correctly shows the chart as being checked out.

**Solution:** Fixed so that in the above scenario, axiUm no longer displays chart requests that are checked out.

---

### 136148 - Confirming appointment re-creates chart request

**Module:** Chart Tracker - Chart Request tab

**Problem:** When axiUm automatically submits a chart request for an appointment, and you delete this chart request, and then confirm the appointment, axiUm re-submits the chart request.

**Solution:** Fixed so that axiUm re-submits the chart request only when you select an active appointment and change the chair, provider, date, or time.

axiUm will not re-submit a chart request when you:

- Confirm appointments
- Update appointment statuses
- Edit appointment notes
- Sign in patients
- Check in patients
- Seat patients
- Move reservations

---

### Dispensary

### 131679 - Unable to delete Appt type dispensary request

**Module:** Dispensary - Requests tab

**Problem:** The Requests list view displays requests that were manually entered or auto-generated by appointments (Req Type = Appt). If a user tries to delete an Appt request type, it is removed from the list view but redisplays after the Dispensary window is refreshed.

**Solution:** Fixed so that when you attempt to delete a dispensary request from an active appointment, axiUm displays an error message. If the appointment is canceled, rescheduled, or moved to pending, the system will remove the request.
axiUm displays this window to prevent users from deleting the Appt type of dispensary request.

136520 - Deleting dispensary request removes incorrect record

Module: Dispensary

Problem: When you delete a dispensary request, axiUm deletes the record containing an order ID identical to the request ID of the record you selected to delete. For example, if axiUm has the following dispensary requests in the database:

- Request #1: Dispensary Request ID = 414, Order ID = 390
- Request #2: Dispensary Request ID = 450, Order ID = 414

Then when you select to delete Request #1, axiUm deletes Request #2 instead, and Request #1 remains active.

Solution: Fixed so that in the above scenario, axiUm deletes the dispensary request you selected to remove.

136664 - Lost dispensary item displays on checked out list

Module: Dispensary ~ Checked In window, Check Out window

Problem: When a checked out dispensary item is marked as lost, it displays in the Check In window as checked out (available for check in). This item also displays in the Check Out window.

Solution: Fixed so that in the above scenario, axiUm no longer displays the dispensary item in the Check In window or the Check Out window.

137973 - Cannot select user with internal ID longer than 6 characters

Module: Dispensary ~ Check Out window

Problem: This problem will only occur if the Users database internal sequence number has reached seven characters. This problem occurs if you have your workstation set up to use log in ID instead of provider ID (in Dispensary window – Setup button – Workstation Options section, the Identify Provider By drop-down field displays the User Login option). Then if you go to the Check
Out window and click on the User Login field (ellipsis) to select a provider whose internal ID is longer than six characters, axiUm does not display your selected user in the User Login field.

**Solution:** Fixed so that in the above scenario, axiUm displays the selected user’s logon ID.

---

**EDI Claims**

**127091 - Need to increase size of list view**

**Module:** EDI Claims ~ EDI Claims window  
**Problem:** Need to increase the size of the list view.  
**Solution:** Increase the size of the list view.

Current:

![Old List View](image)

New:
Also made the same changes to the following modules:

- Evaluations module
- Dispensary module
- Lab Tracking module
- Personal Planner module
- Overdue Patients module
- Chart Tracker module
- Inventory module
- Patient Assignments module

129228 - Auto Batch Claim Error Warning window is not displaying

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

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

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

129275 - DMG & PAT*04 segments causes claim rejections

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

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

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

- X12N50DenReqByEmdeon item
- X12N50MedReqByEmdeon item

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

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

129531 - Blank fields in 5010 segments are written into the EDI file

Module: EDI Claims ~ EDI Claims window

Problem: If 5010 segments contain blank fields, and these blank fields are included in the EDI file, Emdeon rejects the claim.

Solution: Fixed so that if 5010 segments contain blank fields, axiUm omits these fields from the EDI file.

129890 - Warning pops up when it shouldn't

Module: EDI Claims ~ EDI Claims window

Problem: If you change the delay reason of a claim record, axiUm displays the Existing Delay Reason Warning window, and this is fine. However, when you click the No button, axiUm displays the Enter Delay Reason Warning window. This window is unnecessary.

Solution: Fixed so that in the above scenario, axiUm no longer displays the Enter Delay Reason Warning window.

130005 - Erroneous records are returned

Module: EDI Claims - Remittance Responses tab

Problem: When processing 835 remittance responses, the insurance lookup was failing in some cases.

Solution: Fixed.
131123 - Invalid default qualifier for secondary IDs

Module: EDI Claims

Problem: In 4010 EDI claims, if the rendering provider has a blank billing number (in Maintenance window - Insurance tab - Insurance Companies - Edit Record - Insurance Company - Billing Numbers button - Billing Number window, the Billing No field is blank), axiUm sends 1E as the default qualifier. This causes medical claims to be rejected because it is an invalid qualifier for 4010 format.

Solution: Now, for 4010 medical and institutional EDI Claims, if there is no billing number, axiUm sends G2 (Provider commercial number) instead of 1E.

131526 - Claim form does not default the billing number qualifier

Module: EDI Claims ~ EDI Claims window

Problem: In 5010 EDI claims, the Billing Provider qualifier is always populated with G2. This should populate with the value of the billing provider (as set up in the Billing Number window's Billing No. drop-down field).

Solution: Fixed so that the acceptable values in this segment are G2 and LU. If it is one of these two values, axiUm now populates with the Billing Provider's qualifier; otherwise axiUm uses the qualifier G2.

133453 - Diagnosis codes not matching pointers

Module: EDI Claims

Problem: For Medical claims and Dental claims with ICD code information specified on the Tx Medical Information window, if the codes are not entered sequentially (i.e. there are four positions available and three codes are entered in positions 1, 2, and 4), when the claim gets submitted to EDI, the pointer values in the SVC segment point to codes 1, 2, and 4 but in the HI segment, there are only three codes listed. In addition, the medical information can be updated after the claim is batched, so the error message was updated to reflect this.

Solution: Fixed so that:

- The diagnosis codes and pointers match.
- The message, "Medical information cannot be modified as the treatment has been submitted or deleted" has been changed to, "Medical information cannot be modified as the treatment has been batched, submitted, or deleted."

135010 - Incorrect K3*JO segment on claim

Module: EDI Claims

Problem: Incorrect segments on submitted Medical EDI claims causes claim rejections for some payors.

Currently printing: 'K3*JO 10 20 ~'
5.20 Bug Fixes

5.20.20

Bug Fixes

Modified: 27-Aug-14

Should be printing: 'K3*JO10 20 ~' (no space after JO).

The spacing between JO and the first value is causing Emdeon to truncate the 0s. Submitting this to the payer causes claim rejections.

Solution: Fixed so that in the above scenario, axiUm omits the space.

---

135712 - Leading & trailing spaces in policy causes claim rejections

**Module:** EDI Claims

**Problem:** If the Subscriber# field (In Patient Info window - Insurance tab - Subscriber section) contains spaces before and after the value, submitting a claim for this policy causes claim rejections.

**Solution:** Fixed. You can still enter leading and trailing spaces in the Subscriber# field, but axiUm now removes them from the submitted claims.

The same fix was made to the Group field (in Patient Info window - Insurance tab - Plan section).

---

136211 - Need details in EDI file (Loop 2400 SV101-7) for Undefined Procedures

**Module:** EDI Claims

**Problem:** Medical Claims which contain undefined procedures get rejected because of lack of description regarding the code submitted when it is 5010 Medical.

**Solution:** When creating an EDI file, axiUm will look up a list of which codes are undefined (customizable in TRX_PKG) and if the code being submitted is in the list, pull the description from the original code into SV101-7 section. This is available for Medical and Dental 5010 EDI claims.

There are two parts to the solution.

1. First, procedures used by your institution that have a description that is not specific enough for insurance companies (usually these contain the words ‘Undefined’, Not Otherwise Classified, Unlisted, etc) need to be identified and listed in your TRX_PKG.

2. Secondly, new procedures should be setup up in Maintenance to allow providers to more specifically define the procedure performed.

For example, M21089 may get rejected as it’s description is generic. To handle this you would:

   a) In Maintenance | Procedure Codes, add another procedure code with the following setup:

      i. Add M21089a (and M21089b, M21089c, etc. as needed)
      ii. Ensure Print Description defines the procedure adequately
      iii. Enter billing procedure code in Insurance field (in this example, M21089)
      iv. Add M21089 to the list of Undefined Procedure Codes in your TRX_PKG

Then, when providers is entering this procedure, they should choose M21089a instead of M21089 (to enforce this, you may want to mark M21089 (the original code) as ‘Inactive’).
axiUm will find M21089 in the list of Undefined Procedures, then submit the Print Description from M21089a in the SV101-7 5010 EDI segment. This will satisfy the payor’s need for additional information.

---

**136729 - Auto Claims submitting pre-auths to EDI when InsCo accepts EDI claims only**

**Module:** EDI Claims

**Problem:** If insurance is set up to submit claims only (in Maintenance window - Insurance tab - Insurance Companies icon - Insurance Companies List window - run search - highlight item in list view - (Edit Record) - Insurance Company window - EDI Settings button - EDI Settings window, the Transactions drop-down field displays the Claims only option), axiUm is still batching planned treatments for EDI when a pre-auth is required. This only happens when using Processes | Auto Claims.

**Solution:** Fixed so that in the above scenario, axiUm no longer batches these planned treatments.

---

**137861 - K3* segment in loop 2400 causes claim rejections**

**Module:** EDI Claims

**Problem:** A K3 segment was added to 5010 EDI Medical claims to identify tooth number or oral cavity as required by the 5010 specs. All insurance companies are not able to accept the information in this segment. Some would like this information included in the 2400 SV101-7 segment.

**Solution:** Fixed by adding a new station option to indicate how and where to place the site information for the X12N Medical claim.

**Setup:**

1. Open the Station Options window.

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

2. Go to the EDI Claims section - Claim Formatting section - X12NMedicalReqSite item (new):
0 - Not Applicable: No site segment/field displays on EDI claims for 4010 claim forms and 5010 medical claim forms.

1 - Using K3 segment: K3 segment is used to display the site information on 4010 claim forms and 5010 medical claim forms.

2 - As part of SV101-7 (5010 only): The site information will be displayed for 5010 claim forms.

Note: The Site Segment drop-down field is displayed in the EDI Submission window. You can access this window by going to the EDI Claims window's Unsubmitted Procedures tab, going to the Claim drop-down field and selecting the X12N5010 Medical option, clicking the Search button, selecting a record with black text, and then clicking the Submit button.

138383 - EDI Claims speed improvements for search & submit

Module: EDI Claims

Problem: In EDI Claims dialog, the search and batching of large numbers of claims is slow.

Solution: When searching in the EDI Claims Unsubmitted tab, the complete list will now load after the search is complete instead of displaying partial results while the search continues, which will result in a faster response time. Validations have also been optimized to further reduce the time it takes to complete submission of an EDI batch.
**120756 - Restoring parent answer is not restoring child answer**

**Module:** EHR - Forms tab  

**Problem:** If you answer both a parent question and a child question, approve the form, and then change the answer of the parent question, axiUm deletes the answer to the associated child question, and this is fine. Then if you deny the changes made to the parent question, axiUm restores its answer to the previous (i.e. approved) answer, and this is also fine. However, the answer in the associated child question remains deleted, and this should be restored to the previous (i.e. approved) answer.

**Solution:** Fixed so that in the above scenario, axiUm restores the answer to the child question.

---

**125104 - Non-covered NY Medicaid txs appear on separate claims**

**Module:** EHR  

**Problem:** When a patient (on NY Medicaid, non-covered) receives multiple treatments and you checked out all treatments simultaneously, axiUm creates a separate claim for each treatment.

**Solution:** Fixed so that in the above scenario, axiUm groups the treatments into a single claim.

---

**126534 - Copied tx plans not retaining problem’s approval status**

**Module:** EHR - Tx Plans tab  

**Problem:** When you copy a treatment plan (by clicking ![Copy Record](Copy Record)), axiUm fails to retain the approval status of their problems.

**Solution:** Fixed so that in the above scenario, axiUm retains the approval status of the problems.

---

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

**Module:** EHR - In Progress tab  

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

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

---

**128462 - Problems printing the estimate report**

**Module:** EHR ~ Estimate window  

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

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

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

3. From the list view, highlight a record.

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

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

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

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

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

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

Solution: Fixed the display issue.

128697 - Chart Add sizing problem

Module: EHR - Chart Add tab

Problem: If your screen resolution is set to 1024 x 768 or higher, and you maximize the EHR window in the Chart Add tab, there is too much space allocated to the left side.

Solution: Fixed so that in the above scenario, the left and right sides are evenly spaced.

128871 - Error message preventing completion of upper arch txs

Module: EHR - Chart Add tab

Problem: If you add a procedure code for the upper arch, and then try editing the procedure status, axiUm displays an error message.

This error message prevents the completion of any upper arch treatments in the system.

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

128939 - Patient Medical Alerts window defaulting the Alert Code field

Module: EHR ~ Patient Medical Alerts window

Problem: When you open the Patient Medical Alerts window by going to the EHR window’s Alerts tab and clicking on the word Medical Alerts -- not by clicking the specific medical alert item below it (e.g. Latex Allergy) -- axiUm defaults the Alert Code field to the last code entered for this patient.

If you want to enter a new record, this forces you to click (Clear Data) before you begin.

Solution: Fixed so that in the above scenario, the Alert Code field defaults to blank.

128995 - Unable to delete planned treatments

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

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

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

**Solution:** Fixed so that in the above scenario, axiUm no longer displays this message for planned treatments, but still displays it for in-process or completed treatments.

Note: This bug fix reversed a previous bug fix 124133 (see 5.10 Bug Fix doc). This re-introduces the problem, but was necessary to fix 128995.

---

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

**Module:** EHR - Medications tab

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

**Steps to replicate:**

1. Go to EHR module's Medication tab.

2. Click (Create a new Record) and select the New Prescription option to display the Patient Prescription Entry window.
3. From the Drug drop-down field, select a drug. For our example, we will select ‘Amoxicillin’ (including the single quotes).

4. Click (Add a new Record).
   axiUm displays the Database Warning window, then crashes.

   The same problem occurs in the Patient Medication Entry window (in EHR module - Medication tab - (Create a new Record) - Existing Medication option).

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

---

**129039 - Unnecessary AUDITHIS records are created**

**Module:** EHR - Medications tab

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

**Solution:** Fixed so that axiUm creates only one AUDITHIS record.
129309 - Bad data creates unrelated treatment record
Module: EHR - Chart Add tab
Problem: Sometimes, if you create treatment1, then you add a treatment-specific EPR form to it, and then you create treatment2, axiUm displays an unrelated treatment in the list view between these two treatments. This is caused by bad data.
Solution: Fixed bad data.

129332 - Apostrophe in custom field causes SQL error
Module: EHR - Tx History tab
Problem: When a treatment has a custom field that contains an apostrophe, and you double-click on the treatment record, axiUm displays an SQL error message.
Solution: Fixed so that in the above scenario, axiUm no longer displays an SQL error message.

129525 - Tail is missing on letter (y) in X-Ray
Module: EHR ~ Preventative Care window
Problem: There is a tail missing on the letter (y) in ‘X-Ray.’
Solution: Fixed so that the tail is no longer missing.

Current:

New:

129603 - Patient Approvals window omits SOAP note details
Module: EHR ~ SOAP Note window
Problem: If you enter a SOAP note as a treatment note (by going to the EHR window’s Tx History tab, highlighting a treatment record, and the selecting the Add Tx Note right-click option), the Patient Approvals window’s Site column shows nothing for this SOAP Note record.
Solution: Fixed so that in the above scenario, the Site column displays the tooth site indicated on the associated treatment record.
129606 - You can create problem records using header codes

**Module:** EHR ~ Update Problems window

**Problem:** In the Update Problems window (in EHR window - Problems tab - right-click - Update Problems option), go to the Problem field and do one of the following:

- Manually enter a heading code.
- Click on (ellipsis) to display the Select Problem window, highlight a problem heading, and press the Enter key.

axiUm lets you create a record using this code. Problem records cannot contain heading codes.

**Solution:** Fixed so that in the above scenarios, axiUm displays the messages:

- “Invalid Problem”
- “This is not a Problem Code”

129703 - axiUm appears to hang

**Module:** EHR - Tx Plan tab

**Problem:** If you go to the Patient Acceptance tab, click the Accept/Print button, sign the acceptance, and in the Billing Options for Planned Treatment window you click the OK button, axiUm appears to hang when it is actually processing. Exiting axiUm by pressing ctrl+alt+delete, causes missing records in the database.

**Solution:** Fixed by:

- Showing a progress bar to the Save to Chart process.
- Placed transaction processing around each treatment record to be saved in the saving process. This prevents records from corrupting in the event you exit during the saving process.

129847 - Current medication records are listed in different order

**Module:** EHR - Medications tab

**Problem:** If you add multiple medication records on the same day and these records have the same end date, axiUm displays these records in a different order in the Medications tab than in the Alerts tab’s Current Medications section.

**Solution:** Fixed so that in the above scenario, axiUm lists the medication records in the same order. axiUm sorts these records based on the following order:

- end date
- entry date
- entry order
129980 - Auto-checkout causes incorrect insurance calculation

**Module:** EHR

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

- Treatments are added by providers who do not require approval.
- The patient has multiple insurance policies.
- The treatment date is in the past.

When this occurs, axiUm's auto-checkout omits calculating the secondary insurance split. To correct this, you must re-bill the claim in the Transactions module.

**Solution:** Fixed so that in the above scenario, axiUm calculate correctly.

129990 - Display problem on warning window

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

**Problem:** When you go to the PowerAdmin module and in the Services Not Covered Warning window you disable both the Yes button and the No button, the associated window in axiUm is displayed off the screen. If you try moving this window, it stretches (rather than moving) and as a result it distorts the window.
**Solution:** Fixed so that in the above scenario, the window displays normally.

---

**130157 - Change title of Expanded Text Edit Dialog in Template Notes**

**Module:** EHR ~ Template Note window  

**Problem:** The window title of the Expanded Text Edit Dialog window should be changed to Expanded Text (Template Notes).

**Solution:** Renamed the window title to Expanded Text (Template Notes).

---

**130324 - Medications tab not obeying PowerAdmin settings**

**Module:** EHR - Medications tab  

**Problem:** When you go to the PowerAdmin module and disable either the Medications option or the Prescriptions option displayed in the EHR window’s Medications tab, the EHR module does not obey these settings.
For example: You have PowerAdmin set up to hide the EHR window's Medications tab's Prescriptions option (so only the Medications option is shown), but you have axiUm set up to select the Prescriptions option by default. When you go to the EHR window's Medications tab, only the Medications option is available to select (the Prescriptions option is hidden), but axiUm contradicts this by displaying prescription records in the list view. If there is a conflict between PowerAdmin and axiUm settings, the PowerAdmin setting must take precedence. Continuing this process, if you add a medication record, axiUm displays this medication record in the current list view (i.e. the prescription list view), and it should be displayed in the medications list view.

Solution: Fixed so that the Medications tab obeys PowerAdmin settings and any conflicts such as the example above are resolved.

130330 - Medical Alerts table value not being maintained
Module: EHR - Alerts tab
Problem: If you go to the Medical Alert Codes window (in Maintenance window - EHR tab - Medical Alerts icon), and you update a record (by accidentally clicking (Add a new Record) first and then correctly clicking (Modify Record)), the ALERTD2.Auto value is not maintained. This causes the medical alert code modified in this way to no longer display in patient records.
Solution: Fixed.

130408 - axiUm lets you complete inactive, unapproved treatments
Module: EHR - Tx History tab
Problem: If a parent procedure is made inactive and is also waiting for a change to be approved, you can still complete the child procedure as long as the parent procedure remains unapproved.
Solution: Fixed so that in the above scenario, axiUm displays the message, “Parent procedure of the treatment is Inactive and cannot be completed.”

130422 - Refresh issue
Module: EHR ~ Tooth Notes/Conditions window
Problem: If you are a provider who requires approval for conditions, and you open the Tooth Notes/Conditions window (in EHR window - odontogram - right-click - Tooth Notes/Conditions option), and then you add a condition to a patient record, axiUm displays the record in blue text (indicating that approval is required), and this is fine. However, the approval indicator on the status bar remains gray. This is a refresh issue. If you select a different patient and re-select the original patient, the indicator turns blue.

Note: Entering a condition through the EHR window's Chart Add tab works fine.

Solution: Fixed the refresh issue. Now in the above scenario, the indicator turns blue immediately.
130510 - Creating appointment request submits chart request

**Module:** Scheduler

**Problem:** Creating an appointment request for a patient with a paper chart causes axiUm to submit a chart request. axiUm should generate a chart request only when you schedule an appointment.

**Solution:** Fixed so that when you create an appointment request, axiUm no longer submits a chart request.

130588 - Medication windows contain prescription heading

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

**Problem:** In the following windows, axiUm displays a section called Patient Prescription:

- **Patient Medication Entry window**
  
  Go to EHR window - Medications tab - ![Create a new Record] - Existing Medication option.

  ![Patient Medication Entry window]

- **Edit Patient Medication window**
  
  Go to EHR window - Medications tab - Medications option - double-click a record in the list view.
Because these are medication-type windows, the Patient Prescription section should be renamed to the Patient Medication section.

**Solution:** Changed the section name to Patient Medication in both windows.

---

**130669 - Signature capture failure causes blank duplicate EPR form**

**Module:** EHR - Forms tab

**Problem:** In some cases, when axiUm fails to capture the patient signature on an EPR form, it attaches a blank duplicate EPR form.

**Solution:** Now when axiUm fails to capture the patient signature, axiUm displays the error message, “An error occurred while saving the signature. Please try again.” This ensures the patient signature is captured correctly to avoid problems.

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**130729 - Inconsistent behavior when approving conditions**

**Module:** EHR ~ Tooth Notes/Conditions window

**Problem:** When you go to the Tooth Notes/Conditions window (in EHR window - odontogram - select tooth - Tooth Notes/Conditions right-click option) and you delete or resolve a tooth condition, axiUm applies incorrect approval rules.

**Solution:** Fixed so that when you delete or resolve conditions in the Tooth Notes/Conditions window, axiUm applies the correct rules. When a condition is:

- **Unapproved:** The condition requires no approval because the condition was never approved to begin with.
- **Approved:** The condition requires another approval because you are changing the condition after it was previously approved.
130757 - Need warning when changing drug dose if frequencies exist

**Module:** EHR - Medications tab

**Problem:** When a drug dose is modified (Maintenance window - EHR tab - Drug Definitions icon - highlight a record - click \(\text{Drug Doses}\)), the associated drug frequencies are lost.

**Solution:** Fixed by adding a warning message followed by a Yes/No option.

- Yes: The records are retained in the Drug Dose Frequencies window.
- No: The records are cleared from the Drug Dose Frequencies window.

axiUm displays ‘Warning: This Drug Dose has Frequencies attached. Would you like to keep these Frequencies for this modified Drug Dose?’

131335 - Strange display of toolbar popup menu

**Module:** EHR - Medications tab

**Problem:** When you log onto axiUm as a user with no access to the eRx module, you can still access it.

**Steps to replicate:**

1. Log on to axiUm.
   
   Make sure you are a user who has no access to the eRx module (In the Users window - Clinical tab - Can Prescribe section, the Can Use eRx checkbox is deselected).

2. Go to EHR window - Medications tab.

3. Click \(\text{left arrow}\) to undock the menu.

4. Click \(\text{Create a new Record}\). Menu contains two items: New Prescription and Existing Medication.
5. Click (right arrow) to undock the menu.

6. Hover on the (right arrow) to pop up the toolbar.

7. Click (Create a new Record).
   The following options are displayed:
   - New Prescription
   - Existing Medication
   - axiUm eRx

8. Click axiUm eRx.
   axiUm launches the eRx module.

This gives you access to the eRx module although you have no access rights for it.

**Solution:** Fixed so that in the above scenario, only the New Prescription option and the Existing Medication option are displayed.
131407 - Notes icon for alerts not refreshing

**Module:** EHR - Alerts tab

**Problem:** If a patient has multiple medical alerts, and you click ![Alert](image) in the status bar, and then you enter a note, the notes icon does not display next to the alert.

**Solution:** Fixed so that in the above scenario, axiUm refreshes the Alerts tab immediately, and displays ![notes](image) next to the alert.

---

131411 - Chart Add display issues with general notes and deleted treatment

**Module:** EHR - Chart Add tab

**Problem:** If a note is the first row in the list view, and the second row is a treatment, then you delete the treatment, both are removed, even though the note has not been deleted. If the rows are reversed, the treatment is removed and the note remains in the list view.

**Solution:** Fixed so that notes no longer remain if the associated treatment has been deleted.

---

131482 - Refresh issue

**Module:** EHR - Chart Add tab

**Problem:** If a provider logs into axiUm and clicks the Details sub-tab in Chart Add, axiUm defaults the Provider field to the provider's ID, and this is fine. Then if that provider enables Entry on Behalf of Provider for a different provider, the Provider field still displays the logged-in provider's ID. You must close and re-open the EHR module for the Provider field to display the proxy provider's ID. This is a refresh issue.

**Solution:** Fixed so that in the above scenario, axiUm refreshes the Provider field immediately.

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131551 - Scanned images are missing

**Module:** EHR - Forms tab

**Problem:** If an EPR form contains two attachment-type questions that are vertically spaced apart enough that both are not visible at once, and you perform the following steps:
1. Add an attachment to the question at the top of the form.
2. Scroll using the mouse or scroll bar so that the top question is not visible.
3. Add an attachment to the question at the bottom of form.
4. Scroll back up to the top of the form with the mouse wheel or scroll bar.

Then it appears as if the attachment was not added. No history of an added attachment is shown. Internally, the attachment is uploaded to the database but it is not linked to the question on the form. Recovery in this case may be problematic if the attachment is a scanned copy of a paper form that is later destroyed.
Solution: Fixed so that in the above scenario, the link between an attachment and a question is not lost when the question is scrolled out of view.

131606 - Right-click option displays incorrect window

Module: EHR - Tx History tab

Problem: When you select a planned treatment record containing an appointment request, and then you select the Patient Appointments right-click option or the Family Appointments right-click option, axiUm displays the Appointment Request window.

Solution: Fixed so that in the above scenario, axiUm displays the Patient Appointments window or the Family Appointments window, respectively.

131638 - Display issue

Module: EHR - Tx History tab

Problem: If you go to the list view and move the horizontal scroll bar to the right and then click on a column heading, axiUm returns only the scroll bar and contents to their original position while retaining the column headings on the right. This results in mismatched columns and contents.

Default display:

Then... after scrolling the horizontal bar to the far right of the list view (notice the column heading and content matches):
Then...after clicking on a column heading (notice the column heading and contents are now mismatched):

The same problem exists in the Ortho Tx History window and the Perio Tx History window.

**Solution:** Fixed so that in the above scenario, axiUm retains the column heading with its associated content.

---

**131723 - Problems with multiple users simultaneously editing forms**

**Module:** EHR - Forms tab

**Problem:** If two users are editing the same EPR form question (either images or attachments), axiUm deletes both users’ changes.

**Solution:** Fixed so that:
1. While user A is currently editing an answer, if user B tries to answer the same question, axiUm displays one of the following messages:
   - For image-type questions: “This image question is already being answered by another user. Please try again later.”
   - For attachment-type questions: This attachment question is already being answered by another user. Please try again later.

2. Then if user A finishes changing the question and user B tries re-opening the same question, axiUm displays the message, “This question has been changed by another user. Cannot continue. Please close and re-open the form to make sure you have the most recent changes.”

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**131786 - Problem with display of Medications/Prescriptions option**

**Module:** EHR - Medications tab

**Problem:** Depending on the default Medications/Prescriptions option set up on your workstation, opening a record clears the state of the Medications/Prescriptions option.

**Steps to replicate:**

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

2. Go to EHR branch - Medications section - EHRMedMode item.
3. In the Current Value field, enter 0 (Medications).

4. Open the EHR window’s Medications tab.
   The Medications option is selected by default, and this is fine.

5. Select the Prescriptions option.
   axiUm displays prescription records in the list view.

6. From the list view, double-click on a prescription record to open it and then close the window.
Problem: The Prescriptions option is cleared, and it should remain selected. Note that both options are cleared.

We will now reverse the default Medications/Prescriptions station option.

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

8. Go to EHR branch - Medications section - EHRMedMode item.

9. In the Current Value field, enter 1 (Prescriptions).

10. Open the EHR window’s Medications tab.
    The Prescriptions option is selected by default, and this is fine.
11. Select the Medications option.

   axiUm display medication records in the list view.

12. From the list view, double-click on a prescription record to open it and then close the window.

   Problem: The Medications option is cleared, and it should remain selected. Note that both options are cleared.

   Solution: Fixed so that in the above scenario, the Medications/Prescriptions option remains selected.

131789 - List view sorts incorrectly (1)

Module: EHR - Tx History tab

Problem: There are two problems:

Problem 1:
Clicking on any column heading (displayed after the Diagnosis column) fails to correctly sort the list view.

Problem 2:
Clicking on the Prov./User column heading sorts the list view by provider code. Because the Prov./User column displays provider names, sorting by provider code causes the list view to appear to sort incorrectly.

**Solution:** Fixed.

Solution 1:
Clicking on any column heading displayed after the Diagnosis column now sorts the list view correctly.

Solution 2:
Clicking on the Prov./User column heading now sorts the list view by provider name.

---

### 131884 - Refreshing causes blank field

**Module:** EHR - Tx History tab

**Problem:** When logged in as a user that has eRx enabled in axiUm but who is not registered in axiUm eRx, and you add an existing medication and click the Refresh eRx button, axiUm blanks the Entry User field and turns the line’s text blue as if it were unapproved.

**Solution:** Fixed so that in the above scenario, the Entry User field retains its value and the text remains black. Note that the refresh in this case will still fail until the user is registered in axiUm eRx.

---

### 131908 - eRx refresh causes crash

**Module:** EHR - Medications tab

**Problem:** If you (a user registered with DrFirst™ Rcopia®), select a patient record (containing missing information required for DrFirst™ Rcopia® registration), and you click (Refresh eRx), axiUm displays the eRx Synchronization Warning window, and this is fine. However, clicking the OK button to close this window still runs the refresh, causing it to fail, and axiUm crashes.

The same problem occurs if you click (Create a new Record) and select the axiUm eRx option.

**Solution:** Fixed so that in the above scenarios, axiUm does not run the refresh.

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### 131950 - List view sorts incorrectly (2)

**Module:** EHR - Tx History tab

**Problem:** Clicking on the Diagnosis column heading sorts the list view by diagnosis code. Because the Diagnosis column displays diagnosis descriptions, sorting by diagnosis code causes the list view to appear to sort incorrectly.

**Solution:** Fixed. Clicking on the Diagnosis column heading now sorts the list view by diagnosis description.
131967 - Rx printing causes crash

Module: EHR - Tx History tab

Problem: axiUm crashes when a prescription for drug whose Drug Description contains an apostrophe is added, printed, refilled, has interactions, etc.

Setup:

1. Open the Drug Doses window.
   Go to Maintenance window - EHR tab - Drug Definitions icon - Drug Definition List window - (Drug Doses).

2. In the Dose field, enter a dosage. For our example, we will enter 500mg/10ml – injct’n.

3. Click (Add a new Record).
   axiUm adds the new dosage record to the list view.
4. Click (close).

axiUm closes the Drug Doses window and returns to the Drug Definition List window.

5. Click (close).

axiUm closes the Drug Definition List window and returns to the Maintenance window.

Steps to replicate:

1. Open the EHR window’s Medications tab.

2. Click (Create a new Record) to display a list of options.

3. Select the New Prescription option.

axiUm displays the Patient Prescription Entry window.

4. Enter the fields and options.

Make sure that the Dosage drop-down field displays an apostrophe (‘). For our example we will enter 500mg/10ml - injct’n.
5. Click (Add a new Record). axiUm adds the record to the list view.

<table>
<thead>
<tr>
<th>Drug</th>
<th>Dose</th>
<th>Total</th>
<th>Refills</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acyclovir (Zovirax)</td>
<td>500mg/10ml inj &amp; oral</td>
<td>0</td>
<td></td>
</tr>
</tbody>
</table>

6. Click Done.

axiUm displays a Database Warning window.

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

132051 - Deleting custom fields causes records to sort incorrectly

Module: EHR - Tx History tab

Problem: If you delete a custom field, clicking on the associated column heading sorts the list view incorrectly.

Solution: Fixed so that in the above scenario, axiUm sorts the list view correctly.

132311 - Patient Recalls window shows incorrect clinic

Module: EHR ~ Patient Recalls window

Problem: When you open the Patient Recalls window (by going to the list view and double-clicking a recall record), the details are based on the recall record selected, and this is fine. However, the Clinic drop-down field shows the default clinic in your user record (in Maintenance module - Office tab - Users icon - Users List window - run a search - (Edit Record) - Users window - Additional tab - Scheduling section - Clinic button - User Clinics window).

Solution: Fixed so that in the above scenario, the Patient Recalls window’s Clinic drop-down field displays the clinic location of the selected recall record.
132464 - Window disregards approver’s PowerAdmin rights

**Module:** EHR ~ Provider Non-Treatment Warning window

**Problem:** The Provider Non-Treatment Warning window uses the logon user’s PowerAdmin rights rather than the approver’s. For example, if you have this window’s Yes button set to yellow for a student and green for an instructor, when the instructor swipes to approve the treatment, this button remains disabled.

**Solution:** Fixed so that the Provider Non-Treatment Warning window uses the approver’s PowerAdmin rights.

132528 - Dividers for columns show two lines instead of one

**Module:** EHR - Forms tab

**Problem:** If a form is not long enough to require a vertical scrollbar, double vertical lines separate the columns, and a double horizontal line displays after the last question.

**Solution:** Fixed so that in the above scenario, single vertical and horizontal lines display.

132685 - Cannot minimize windows

**Module:** EHR ~ General Note window, Template Note window, SOAP Note window

**Problem:** When you open any of the note windows, clicking (minimize) does nothing.

**Solution:** Fixed so that in the above windows, clicking (minimize) works.

132809 - Cumulative evaluation from previous grades

**Module:** EHR

**Problem:** This problem occurs when using evaluation forms that have the Treatments are Cumulative checkbox selected and the students grade themselves. If you (a provider who requires sessional grading) change your treatment record from Planned status to In Process status, and receive approval, axiUm displays the associated sessional evaluation form. If you answer some questions, and change the treatment record to Completed status, the previous answers in the evaluation form are blank. You must then locate the previous version of the form by clicking the View Others button.

**Solution:** Fixed so that in the above scenario, axiUm retains the answers.

132827 - Setting discipline for macro treatments still displays warning

**Module:** EHR - Chart Add tab

**Problem:** This problem occurs if all of the following are met:

- In the Practice Options window, the Warn if Discipline is not entered drop-down field displays either the Yes (for I/C txs) option or the Yes (for P/I/C txs) options.
- All treatments within a macro code contain a default discipline.
Then if you add this macro code in the EHR window’s Chart Add tab, axiUm displays the warning, “Discipline has not been entered.”

**Solution:** Fixed so that:

- If all treatments in a macro code contain a default discipline, axiUm displays no warning message.
- If any of the treatments in the macro contain no default discipline, axiUm displays the Discipline Warning (Planned Macros) window (new) that lets you either enter a discipline or continue without entering a discipline.
- If you choose to continue without entering the discipline, axiUm displays the Discipline Warning (Planned) window after the Treatment Macro Processing window to give you another opportunity to enter a discipline for any treatments requiring one.

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**132849 - Problems with multiple users modifying treatments**

**Module:** EHR - Chart Add tab

**Problem:** If user A on workstation A begins modifying a medical treatment record, and during this time user B on workstation B changes this record to Completed status, and then user A finishes modifying it, axiUm hangs on workstation A.

**Solution:** Fixed so that in the above scenario, axiUm displays the following message on workstation A, “This treatment record has been modified by another user. Cannot continue!”

---

**132900 - Forms with additional info & instructions causes crash**

**Module:** EHR - Forms tab

**Problem:** This problem occurs if you add a form to a patient, and the form contains a Yes/No question, followed by a sub-question (e.g. Additional Information question) that has instructions. Then when you enter answers for the sub-question and click the OK button, axiUm sometimes crashes.

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

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**132952 - Completed treatments contain invalid providers**

**Module:** EHR - Tx History

**Problem:** If user1 (a non-provider) adds a planned treatment but leaves the Provider field blank, and user2 (a provider) changes this treatment from a Planned status to a Completed status (by going to the EHR window’s Tx History tab and selecting the Complete Tx right-click option), axiUm leaves the Provider field blank (it should display user2). Because a completed treatment requires a provider, going to the Transactions window’s Treatment tab and opening this treatment record shows a fee guide in place of a blank provider.

**Solution:** Fixed so that in the above scenario, when user2 changes the treatment record from a Planned status to a Completed status, the Provider field displays user2.
133394 - Duplicate database records

**Module:** EHR - Forms tab

**Problem:** If you add an EPR form and highlight a question, and immediately change the EHR window's view mode by clicking (up arrow) or (down arrow), and then answer the selected question, axiUm creates duplicate records in the database.

**Solution:** Fixed to create only one database record.

133398 - Custom fields require patient selection

**Module:** Transactions - Ins Pmt tab

**Problem:** If you have no patient selected, and the custom drop-down fields require entry (in the Maintenance window - Basic tab - Custom Fields icon - Custom Fields window, the Adjustment 1 - 2 fields have the **Entry is required** checkbox selected), axiUm disables these fields. Because you are unable to enter the required fields, you cannot create an insurance payment record.

**Solution:** Fixed so that in the above scenario, these fields are enabled.

133468 - No error message for prescription not on file

**Module:** EHR - Medications tab

**Problem:** When you enter a new prescription not on file, and then you select the Interactions and side effects right-click option, it does nothing, and there is no error message.

**Solution:** Fixed so that in the above scenario, axiUm displays an error message.

```
axiUm displays "There are no interactions or side effects for undefined drugs."
```

133597 - Two blank entries in Discipline drop-down list box

**Module:** EHR - Tx History tab

**Problem:** When you enter a treatment with no discipline, and then double-click the treatment to edit, the Discipline drop-down list box shows two blank entries.

**Solution:** Fixed so that the Discipline drop-down list box shows only one blank value.
133658 - axiUm fails to initialize the eRx interface

**Module:** EHR - Medications tab

**Problem:** When you click the Medications tab, axiUm displays the Database Warning window.

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

133760 - Problems printing estimates

**Module:** EHR ~ Estimates window

**Problem:** This problem occurs if CR .NET is enabled and CR 2008 drivers are installed. When you try printing an estimate, axiUm displays the message, “crtslv.DLL must be registered. Please contact your system administrator.”

**Solution:** Now in the above scenario, axiUm no longer displays this message.

134054 - Prescription refill displays negative value (1)

**Module:** EHR - Medications tab

**Problem:** When you create a new prescription for a patient (in EHR window - Medications tab (Create a new Record) - New Prescription option - Patient Prescription Entry window) and you select the PRN checkbox, and then you click the Done button to print the prescription, the printout displays the refill amount as -1.

**Solution:** Fixed so that the prescription printout shows the refill amount as PRN.

Note: Fixed all custom versions of the report in 135424.

134096 - Patient from old chart still displays after merging charts

**Module:** EHR - Tx History tab

**Problem:** When patient A is the currently selected patient, and you merge chart A into chart B, axiUm continues to display patient A as the currently selected patient and you can still perform certain tasks (e.g. creating treatment records) for this patient.

**Solution:** Fixed so that in the above scenario, axiUm switches the currently displayed patient to patient B.

134112 - Modifying undefined drug resets the Note field

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

**Problem:** If you select a patient and add an existing medication record that is an undefined drug containing a note, and then you modify this undefined drug, axiUm resets the note.
**Solution:** Fixed so that in the above scenario, axiUm retains the note. Later, if you change the undefined drug to a defined one, axiUm resets the note, as the current note is now invalid.

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**134113 - Pharmacy and Phone # fields enabled when Phoned In check box cleared**

**Module:** EHR - Medications tab

**Problem:** In the Patient Prescription Entry window, the Pharmacy and Phone # fields are enabled when the Phoned In check box is cleared.

**Solution:** Fixed so that the Pharmacy and Phone # fields are disabled unless the Phone In or Faxed In check boxes are selected.

---

**134125 - Manually entering drug does not show default dosage**

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

**Problem:** There are two problems:

1. When you manually enter a drug in the Drug drop-down field, axiUm does not display the default dosage in the Dosage drop-down field.

2. Then immediately after this, if you manually enter another drug in the Drug drop-down field, axiUm highlights not only the current drug (this is fine) but also the previous drug, in the Drug drop-down list.

**Solution:** Fixed so that in the above scenario, axiUm:

1. Displays the default dosage.

2. Highlights only the current drug.

---

**134445 - Can change tx record from finding to procedure**

**Module:** EHR - Chart Add tab

**Problem:** When you modify a record by changing the code from a finding to a procedure, or vice versa, axiUm retains the original status. This can result in a procedure record with a finding status (e.g. A), or a finding record with a procedure status (e.g. P).

**Solution:** Fixed so that when you try changing the code from a finding to a procedure (or vice versa), axiUm displays the message, “Code type mismatch for the selected record. Cannot proceed!”

**Note:** With findings (i.e. materials and conditions), you can change a material to a procedure (medical or dental), but you cannot change a material to a condition.
134551 - Surfaces enabled for procedure code with two sites
Module: EHR - Chart Add tab
Problem: When you add a procedure code with two sites, the Surfaces field is enabled in the EHR window’s Chart Add tab.
Solution: Fixed so that in the above scenario, the Surfaces field is disabled.

134558 - Incorrect medical claim ICD codes
Module: EHR
Problem: During the checkout process, if the treatments being approved are grouped onto the same claim, axiUm sometimes merges the ICD codes incorrectly.
Solution: Fixed so that axiUm displays all relevant and correct ICD codes on the claims forms.

134676 - Back-dated Rx record shows current date in associated note
Module: EHR
Problem: This problem occurs when you open the Patient Prescription Entry window to create a back-dated prescription record, and in the Note text box you add a note. Then when you save this record and view the note (by going to the Tx History tab and either double-clicking it or selecting the View Details right-click option), the note displays the current date.
Solution: Fixed so that in the above scenario, the note is back-dated using the same date as the prescription date.

134772 - Tx Service Medical Information right-click option available for Canada
Module: EHR - Tx History tab
Problem: The Tx Service Medical Information right-click option displays when the country is Canada in the Regional System Settings window (Maintenance window - System tab - System Options icon - Regional button). This should be available for USA only.
Solution: Fixed so that this right-click option no longer displays when the country is Canada.

134777 - Pressing the Tab key clears text in template notes
Module: EHR ~ Template Note window
Problem: In the Template Note window, if you enter a long text answer field (by opening the Expanded Text Edit Dialog window, entering some text, and clicking the Close button), axiUm returns to the Template Note window with the focus on (expand icon) instead of the Answer field. Then when you press the Tab key and then the Enter key (to move to the Next button and then activate it), you end up highlighting the entire entry in the Answer field and deleting it.
Solution: Fixed to focus on the Answer field instead of (expand icon). This way, pressing the Tab key moves you to the Next button, and then pressing the Enter key activates the Next button and moves you to the Prev field.

134783 - Multiple treatments on claim deletes diagnosis code

Module: EHR ~ Tx Medical Information window

Problem: This problem occurs when you create two treatment records for the same provider, where each treatment record contains a different clinical diagnosis code, and each clinical diagnosis code is mapped to a different ICD code. Then when you check out the patient, axiUm omits the second diagnosis code from the claim form.

Solution: Fixed so that in the above scenario, axiUm includes the second diagnosis in the claim form.

134876 - Switching user shows previous user when creating notes

Module: EHR ~ General Note window, Template Note window, SOAP Note window

Problem: If you change from user A to user B (by going to Tools menu - Log on As User option), and you create a note as user A, the note indicates user B.

Solution: Fixed so that in the above scenario, the note indicates user A.

134926 - Consent icon fails to refresh

Module: EHR - Tx History tab

Problem: When you add a planned treatment record, and you add the required consent form (that is a non-treatment type), the consent icon remains displayed on the treatment line. This is a refresh issue.

Solution: Fixed refresh issue.

135337 - Audithis table contains orphaned contract record

Module: EHR - Forms tab

Problem: When you add a consent form on a treatment record, axiUm creates a consent record in the contract table and the audithis table. Then if you cancel when prompted for a Signature window and also cancel the Add Patient Consent window, axiUm clears the consent record from the contract table but leaves this record behind in the audithis table.

Solution: Fixed so that in the above scenario, axiUm removes the consent record from the audithis table.
135424 - Prescription refill displays negative value (2)

**Module:** EHR - Medications tab

**Problem:** This is to fix all custom versions of the report in 134054.

**Solution:** Fixed.

135640 - Approving a mix of txs & notes results in incorrect billing ID

**Module:** EHR

**Problem:** If you multi-approve a combination of notes and treatments added by different users with different billing IDs, axiUm approves the associated treatments using the incorrect billing ID.

**Solution:** Fixed so that in the above scenario, axiUm defaults the billing ID of the first treatment provider it encounters in the approval process.

135976 - Problems modifying approved spreadsheets

**Module:** EHR - Forms tab

**Problem:** If you (a provider with no edit rights) go to a spreadsheet row that was approved and change the answer, axiUm displays a message, "Answer has been approved, it cannot be modified," and this is fine. However, axiUm still changes the answer. Then when you try to change it back to the previous answer, axiUm displays the message again, which should have displayed the first time.

**Solution:** Fixed so that in the above scenario, axiUm retains the previous answer.

Also made changes to the Form Item - Question window (changed) (in Maintenance window - EHR tab - EPR Form Setup icon - EPR Form Setup window - (Form Definition) - Form Pages window - (Form Page Definition) - Form Page Definition window - highlight a spreadsheet-type question - (Edit Record).

If you go to the Answer Type drop-down field and select the Spreadsheet option, axiUm changes the checkbox name from Approved answer can be changed by user who 'Require Approval' to Approved spreadsheet can be changed by users who 'Require Approval' (new).
- Selecting this checkbox indicates that you can add columns (if you have not reached the maximum allowed), edit and delete columns, and change answers (if the individual row also has the Approved answer can be changed by users who 'Require Approval' checkbox selected).

- Deselecting this checkbox indicates that after approving the spreadsheet, axiUm disallows any changes, even if an item within the spreadsheet has this checkbox selected.

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**136005 - List view does not match Medication/Prescription selection**

**Module:** EHR - Medications tab

**Problem:** If you manually select either the Medications option or the Prescriptions option (whichever is not the default), axiUm changes the records displayed in the list view to match the selection, and this is fine. However, if you then maximize and then minimize the EHR window, axiUm reverts to displaying the original (i.e. default) records in the list view. This causes in the list view to display prescription records when the Medications option is selected, and vice versa.

**Solution:** Fixed to show the correct list view.

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**137690 - Lost the ability to print eRx prescriptions**

**Module:** EHR - Medications tab

**Problem:** If you select the Medications option and enter an eRx prescription record, axiUm no longer displays the print prompt, and you cannot print.

**Solution:** Fixed to restore eRx prescription printing.
137926 - Unnecessary warning in eRx Synchronization Errors report

**Module:** EHR - Medications tab

**Problem:** If you create a prescription record containing a drug dose that is associated to only one RxNorm code, the eRx Synchronization Errors report displays the warning, “RxNorm xxx is associated with multiple drug + dose combinations.”

**Solution:** Fixed so that when there is a one-to-one association, the message no longer displays.

---

**Evaluations**

126433 - Data missing in periodic evaluations

**Module:** Evaluations - Periodic Evals tab

**Problem:** When two instructors approve the same treatment, axiUm fails to increase the number of contacts of both instructors. This prevents the ability for both instructors to grade the same treatment.

For example: If InstructorA approves an in-process treatment (but does not evaluate), then InstructorB approves the same treatment while retaining the in-process status, axiUm deletes the treatment record approved by InstructorA (i.e. axiUm transfers the record from InstructorA to InstructorB). Because InstructorA can no longer access these unevaluated treatment records, they cannot grade them. Need axiUm to retain the record for InstructorA (i.e. axiUm copies the record from InstructorA to InstructorB).

**Solution:** Fixed.

---

130060 - Column cut off in evaluation form

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

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

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

---

130908 - Blank date fields display no search results

**Module:** Evaluations - Periodic Evals tab

**Problem:** If you enter blank value in the Date From field and/or the Date To field, and you click the Search button, axiUm displays no search results. This is because blank date values are considered invalid.

**Solution:** Fixed so that axiUm considers blank date fields as open-ended values.
131452 - Treatment-based questions are missing

Module: Evaluations ~ Add/Edit Evaluation window

Problem: If you select a completed treatment record, change the provider on that treatment record from provider1 to provider2, and then add a treatment-based evaluation form for provider2, the treatment-based questions are missing from provider2’s evaluation form.

Note: Adding an evaluation form through the EHR module works fine.

Solution: Fixed so that in the above scenario, the evaluation form displays treatment-based questions for provider2.

132997 - Cannot edit student’s self-evaluation form

Module: Evaluations

Problem: If you (an instructor who is also a provider) evaluated a student, editing that student’s self-evaluation form displays the message, “The user cannot add an evaluation for a different provider when the form requires a self evaluation!” This message is incorrect (you are not adding an evaluation). Also, this message prevents you from further accessing the evaluation form.

Solution: Fixed so that in the above scenario, axiUm no longer displays this message and you can edit the student’s evaluation form.

133059 - Comments are not saved on cumulative evaluation forms

Module: Evaluations ~ Add/Edit Evaluations window

Problem: In some situations, if you go to a cumulative evaluation form’s treatment-specific question and you do all of the following:

- To enter a grade, double-click an item from the list rather than manually entering the grade next to the question.
- Enter a comment.

Then when you close the cumulative evaluation form, axiUm does not save the comment you entered. The next time you open this form, the comment is missing.

Solution: Fixed so that in the above scenario, the comment is retained.

133606 - Students can access instructor’s copy of evaluation

Module: Evaluations

Problem: If you are a provider (who is not an instructor), axiUm lets you open an instructor’s copy of an evaluation.

Solution: Fixed so that if you click the Edit button, the Resume button, or the Delete button, axiUm displays the message, “A provider who isn't an instructor can only edit their own self-evaluation.”
133766 - Modifications to last question are not saved
Module: Evaluations ~ Add/Edit Evaluations window
Problem: If you changed the last question by selecting an answer from a list of options (rather than manually entering the answer), axiUm does not save this change.
Solution: Fixed so that in the above scenario, axiUm saves this change.

135073 - First instructor cannot hold evaluation for second instructor
Module: Evaluations
Problem: When an evaluation form requires a second instructor, and the first instructor places this evaluation on hold for a second instructor, axiUm displays the message, “The instructor must approve the evaluation”. axiUm is asking for the second instructor’s approval, however, this instructor is typically unavailable, and as a result the evaluation form cannot be held.
Solution: Fixed so that the first instructor can approve placing the evaluation form on hold.

135641 - Incorrect window name
Module: Evaluations ~ Approve Template Note (Deletion) window (changed)
Problem: If you delete a template note that requires approval, axiUm displays the Approve General Note (Deletion) window. This window name is incorrect.
Solution: This window is now called the Approve Template Note (Deletion) window (changed).

General

43735 - Handling bitmap files in memory
Module: GUI
Problem: Temporary files for graphic bitmap images are created, and then loaded to memory, and displayed on the screen.
Solution: Fixed so that temporary files are no longer created.

85563 - New Database Engine
Module: Database
Problem: Need to replace the current OO4O engine.
Solution: The OO4O engine has been replaced by the OCCI db engine, and its performance is moderately faster.

96228 - Report formula handing null values incorrectly

Module: Reports

Problem: Some reports contain formulas that try to concatenate a null string. This may cause issues in some reports.

Solution: Reports formulas were modified to avoid problems in reports.

101908 - Clean up old bitmap files

Module: GUI

Problem: Many bitmap files are no longer needed in axiUm. These should not be installed.

Solution: Fixed by removing the following bitmap files from the installer:

- Attach.bmp
- dispense.bmp
- eprmgr.bmp
- general.bmp
- infoman.bmp
- labtrack.bmp
- orthomgr.bmp
- OwnedEprMgr.bmp
- PATIENT.bmp
- perioepr.bmp
- periomgr.bmp
- ROLODEXB.bmp
- schedul2.bmp
- transact.bmp

102050 - Failed launch displays no explanation

Module: Error Messages

Problem: If the axiUm install path contains parenthesis, axiUm cannot run. However, if you try launching the application and it fails for this reason, it displays no error message explaining this.

Solution: Fixed so that in the above scenario, axiUm displays the message, “The current file path has parentheses which is not allowed. Cannot proceed!”
105022 - Two overlapping signature areas in Windows Server 2008 SP2 and Windows 7

Module: GUI

Problem: When a Topaz signature pad is used to obtain a signature for a consent form, the Signature window displays two overlapping signature areas.

Solution: Fixed so that a single signature area is displayed.

125154 - Issues with tzigpad.exe on thin client

Module: Signature

Problem: The Topaz interface does not run on a thin client (i.e. Citrix).

Solution: Fixed by implementing a new Topaz interface.

128448 - Problems with SQL for allocating patient payments

Module: Database

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

Solution: Fixed.

128877 - Separators are missing from list of options

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

**Setup:**

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

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

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

4. Click (close).

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

**Steps to replicate:**

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

   ![Tools Menu]

   Solution: Fixed this problem throughout axiUm.

---

129180 - Display issue with up/down arrows

Module: GUI

Problem: When you maximize and then normalize a window, the up/down arrows are hidden.

Steps to replicate:

1. Open the Chart Tracker module.

   ![Chart Tracker]

2. Click (maximize) to maximize the window.

3. Click (maximize) to return the window to its original size.
   The up/down arrows in the Time From and Time To drop-down fields are hidden.
Solution: Fixed so that in the above scenario, the up/down arrows remain visible.

---

**129194 - Auto-update not working (1)**

**Module:** General

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

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

---

**129211 - Auto-update not working (2)**

**Module:** Auto Update

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

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

---

**129909 - Desktop window is missing icon for EDI module**

**Module:** Desktop

**Problem:** There is no shortcut icon for EDI Claims in the Desktop window.

**Solution:** Fixed by adding an EDI Claims shortcut icon in the Desktop window.
129916 - Memory leak
Module: General
Problem: Memory leaks have been detected in multiple modules.
Solution: Fixed memory leaks.

130523 - Strange behavior of Appointment Start Check window
Module: Start Check
Problem: When you open the Appointment Start Check window (by selecting the red start-check indicator on the status bar) and you and click (left arrow), the Description column displays P*.

Solution: Fixed so that in the above scenario, axiUm displays the procedure code description

130813 - Double quotes in names causes report problems
Module: Reports
Problem: If a patient's first or last name contains a double quote ("), and you print an estimate (by going to the Transactions window’s Planned tab and selecting the Print Estimate right-click option), axiUm displays an error message.

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

Note: Double quotes (" ) are still allowed in patient names.

---

130858 - Ability to pass a value to a report parameter

Module: Reports

Problem: Need the ability to pass a value directly to a stored procedure to:

- Increase report performance.
- Reduce complexity of Emdeon statements (we can now use a procedure to generate the delimited file).
- Ease the customer burden of generating statements.

Solution: Fixed by changing the statement and receipt reports to take parameters instead of passing them a selection formula.

---

131208 - Cannot run axiUm with read-only access to axium.ini

Module: Login

Problem: If you have no write access to the axiUm.ini file and you try running the application, axiUm displays the message, "Unable to create INI file. Please contact your system administrator," and axiUm fails to start.

Solution: You no longer require write access to the axium.ini file to run axiUm.

---

131417 - Function PT_NEEDS_TX_CONSENT needs to be optimized

Module: Database

Problem: The function PT_NEEDS_TX_CONSENT is slow. This needs to be improved, so that the Tx History list loads faster for clients using the "Needs Consent" feature.

Solution: Optimized the consent_pkg package.

---

132008 - Multiline tooltip in Windows 8

Module: GUI

Problem: Multiline tooltips are yellow in Windows 8.

Solution: Fixed so that multiline tooltips in Windows 8 look similar to Windows XP and Windows 7.
132731 - Missing character in IPORTAL_PKG.sql

**Module:** Database

**Problem:** The IPORTAL_PKG.sql is missing a forward slash ( / ). This may cause update scripts to fail.

**Solution:** Fixed to include the forward slash ( / ).

132852 - Problem with PAYPLAN_BAL_PKG.PP_OPEN_BAL

**Module:** Database

**Problem:** PAYPLAN_BAL_PKG.PP_OPEN_BAL not correctly handling type 74's, causing miscalculations for insurance payments.

**Solution:** Fixed.

132889 - No logout entry after leaving axiUm running overnight

**Module:** Login

**Problem:** When you leave axiUm running overnight and Oracle is still connected, and then you activate it the next day, it will trigger a shutdown but not create a logout entry.

**Solution:** Fixed so that in the above scenario, axiUm writes a record to the LOG table.

133515 - axiUm closes down after clicking Cancel button

**Module:** General

**Problem:** When more than one user is associated with Windows credentials, and Active Directory 1 (Only use Active Directory) or 2 (Support both Active Directory and regular Logon) is set, and then you click the Cancel button in the Select Log On User window, axiUm closes.

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

134261 - Cannot switch users with swipe card

**Module:** Switch User

**Problem:** Go to the Maintenance module - System tab - Swipe Card icon - Swipe Card Setup window and enter the following setup for your swipe card:

- **Number Of Tracks:** In this field enter 2
- **User ID:** In these fields enter 1, 0, 1
- **User Password:** In these fields enter 2, 0, 1
Then if you go to the Tools menu and click the Switch User option and swipe your card, axiUm displays the message, “Invalid Password”.

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

---

135138 - Start Check txs not updated when procedure changed

**Module:** Start Check

**Problem:** When a procedure code change is approved, appointment treatments display the old procedure code in the Appointed Treatments list view.

**Solution:** Fixed so that in the above scenario, the procedure code is updated.

---

135571 - axiUm unable to handle station name with apostrophe

**Module:** Login

**Problem:** When a station name contains an apostrophe, axiUm displays an SQL error message.

Also, the station cannot be found in the Station Codes window (Maintenance window - System tab - Stations icon).

**Solution:** Fixed so that in the above scenario, the user can login to axiUm, and the station can be found in the Station Codes and Station Option Update windows.
135670 - Refresh issue on status bar indicator

Module: Status Bar

Problem: In some cases, when you add an EPR form to a patient and you answer a question that triggers the status bar indicator, axiUm fails to show the indicator. This is a refresh issue.

Solution: Fixed refresh issue.

136104 - Mail merge causes error message

Module: Word Processing

Problem: Sometimes when you perform a mail merge in the Info Manager module, axiUm displays the message, “Object Variable or With block variable not set.”

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

136618 - No timeout message when eRx connection fails

Module: Login

Problem: If connecting to eRx is unsuccessful, axiUm displays no timeout message. axiUm attempts to establish this connection several times but it can appear as though axiUm is not responding if the connection takes a long time.

Solution: Now in the above scenario, axiUm displays the message, “Retrieving eRx ANS Connection Info (This could take several minutes). Connection attempt 1 of 6.” If connection fails after six attempts, axiUm displays another message, “A connection could not be established. eRx will not be available until the next time you log in.”

136668 - Database connection issue causes crash

Module: Database

Problem: When there are database connection issues, axiUm crashes.

Solution: Fixed so that axiUm displays an error message and no longer crashes.

![Error message](image)

axiUm displays “Error - ORA-12154: TNS:could not resolve the connect identifier specified.”
137827 - Incorrect station option values

**Module:** Database

**Problem:** In the Station Options window (in Maintenance window - System tab - Station Option icons), if you go to EDI Claims section - Eligibility section - MetLifEligPrompt item, the Values field displays:

- 2 - Use "In Network"
- 2 - Use "Out of Network"

**Solution:** Fixed so that in the above scenario, the MetLifEligPrompt item displays the values:

- 2 - Use "In Network"
- 3 - Use "Out of Network"

---

**Info Manager**

84601 - Treatment report omits records with no fee guides

**Module:** Info Manager ~ Treatments report
**Problem:** When you run the Treatments report (in Info Manager module - Billing tab - Treatments category), and you include the fee amount and fee schedule in this report (in Report Definition window - Fee Amount file - Proc. Amount field and Proc. Fee Schedule field), axiUm displays the fee guide amount at the time of treatment, and this is fine. However, if there was no associated fee guide, axiUm omits this treatment record from the Treatments report. This can be a problem if old fee guides become obsolete and are deleted from axiUm.

**Solution:** Fixed so that including the fee amount in the Treatments report now displays multiple records, one for each defined fee schedule, for the same patient and treatment. If the fee schedules have expired, or no fee guide was associated at the time of treatment, the Treatments report shows one record with $0.

---

**122173 - Missing User fields**

**Module:** Info Manager - Clinical tab

**Problem:** Required approvals for Planned Tx, Completed Tx, and Tx Plan are unavailable.

**Solution:** Fixed by adding the User Details file with the following new fields:

- User Prescribe by Proxy
- User Planned Tx Needs Approval
- User Completed Tx Needs Approval
- User Tx Plan Needs Approval

Removed the User Open Sch. Clinic Mode field (duplicate) from the User file and moved the following fields to the User Details file:

- User Is Instructor
- User Scheduler Type
- User View Sch. Days In Future
- User Sch. Days in Future
- User Appt Request Days In Future
- User Charts Locked
- User Disable Chart request
- User Max. Charts out
- User Max. Hrs out
- User Entries by Proxy

---

**127097 - Invalid fields are allowed when creating letters**

**Module:** Info Manager ~ Patient Balances report

**Problem:** axiUm lets you create letters from the Patient Balance report using invalid fields.
**Solution:** Fixed so that in the above situation, when you go to the Select Letter Template window and click the New button, axiUm displays the Mismatch Merge Fields Warning window (new).

![Mismatch Merge Fields Warning](image)

You can ignore this warning by clicking the Yes button. You can also disable this button in the PowerAdmin module to change this warning message to an error message and prevent the user from continuing.

---

**127953 - Mail merge compatible with Dutch date format**

**Module:** Info Manager

**Problem:** This applies to the Dutch version only. Need mail merge date fields formatted in the Dutch date format.

**Solution:** Fixed so that mail merge date fields are displayed in the following format: dd, month alphanumeric in Dutch, yyyy.

---

**128385 - The Patient List report shows blank column**

**Module:** Info Manager ~ Patient List report

**Problem:** In the Patient List report (in Info Manager window - Patients tab - Patient List category), the Next Stage column shows no values unless you specify a condition for this column.

**Solution:** Fixed so that in the above scenario, axiUm displays any existing values in the Next Stage column even if you specify no conditions for this column.

---

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

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

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

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

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

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

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

129365 - Large number of insurance companies causes crash

**Module:** Info Manager ~ Insurance Aged Balances report

**Problem:** When selecting a large number (e.g. 200 or more) insurance companies to Include or Exclude from a search, axium will crash. This applies to various areas including Insurance Aged Balances Info Manager report, Auto Claims processing, and EDI Manager searching.

Steps to replicate:

1. Go to the Info Manager.
2. Click the Practice tab.
4. Click the Print button.
axiUm displays the Print Insurance Aged Balances window.

5. Click on the Insurance Company (ellipsis).
   axiUm displays the Include Insurance Companies window.

6. From the list view, highlight all records.

7. Click (right arrow).

8. This moves the highlighted records to from the Insurance Companies List section to the Selected Insurance Companies section.

9. Click the Close button.
   axiUm closes the Include Insurance Companies window and returns to the Print Insurance Aged Balances window.
10. Click the Preview button.

axiUm crashes.

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

129705 - Closing the Info Manager module crashes axiUm

Module: Info Manager

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

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

129963 - Unable to delete obsolete columns

Module: Info Manager ~ Patient List report

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

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

130029 - Missing Charges report causes crash

Module: Info Manager ~ Missing Charges report
Problem: When you run the Missing Charges report (by going to Info Manager module - Practice tab - Missing Charges category - Missing Charges window), and it contains more than 100 selected clinics, axiUm crashes.

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

---

**130100 - Add medical alert note in Info Manager**

**Module:** Info Manager ~ Medical Alerts report

**Problem:** Patient medical alert note is not available in the Info Manager.

**Solution:** Fixed by adding the Alert Note field under the Alert Info file in the Medical Alerts report (Info Manager module - Patients tab - Medical Alerts category - right-click - Report Definition window).

---

**130289 - Payment with multiple sticky notes shows multiple times**

**Module:** Info Manager ~ Patient Payments report

**Problem:** When a patient payment has multiple sticky notes attached, it shows multiple times in the Patient Payments report (Info Manager module - Billing tab - Patient Payments category).

**Solution:** Fixed so that patient payments appear only once in the following billing reports:

- Treatments
- Planned Treatments
- Patient Payments
- Insurance Payments
- Patient Office Charges
- Patient Adjustments

---

**130696 - Report displaying duplicate records**

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

**Problem:** If you select a new patient and add two treatments for today, and then you run the Clinical Chart report with the following criteria:

- In the Report Definition window:
  - The Selected list view displays only the Patient.Pt First field, the Patient.Pt Last field, the Treatment (Chart).TxChart Treatment Date field.
  - The Distinct Rows checkbox is selected.

- In the Column Conditions window, set the Treatment (Chart).TxChart Treatment Date criteria to today's date.
Then when you run the report, axiUm displays two records for today's visit.

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

---

**130832 - Patient Payments report error**

**Module:** Info Manager ~ Patient Payments report

**Problem:** When you run the Patient Payments report, and include the Pmt. Ref # field under the Patient Payment file (Info Manager module - Billing tab - Patient Payments category - right-click - Report Definition window), axiUm displays an error message.

**Solution:** Removed the Pmt. Ref # field. This was not a valid field.

---

**131454 - Inconsistency between Appointment window and Info Manager**

**Module:** Info Manager ~ Appointments report

**Problem:** There is a 2nd Provider field in the Appointment window. However, the corresponding file in the Info Manager is 'Assistant' (Info Manager module - Appointment tab - Appointments category - right-click - Report Definition window).

**Solution:** Renamed Assistant to 2nd Provider in the Files list view, and Asst to 2Prov in the Fields list view.

These options were changed in the following reports:

- Appointments report
- Appointment Procedures report
- Wait List report

---

**131637 - Debug and read-only access to axiUm folder causes crash**

**Module:** Info Manager

**Problem:** If you have read-only access to your axiUm Program Files folder, and the InfoMgr debug setting is on in your axium.ini, when you run an Info Manager report, axiUm will crash.

**axium.ini setting:**

```
[Debug]
InfoMgr=1
```

**Solution:** Fixed so that in the above scenario, axiUm no longer crashes.
131680 - PROCEDUR.IsLab field in Info Manager twice

**Module:** Info Manager ~ Treatments report

**Problem:** Proc. is Lab and Proc. Is Lab fields display under the Procedure Code file in the Treatments report (Info Manager module - Billing tab - Treatments category - right-click - Report Definition window). These both represent the PROCEDUR.IsLab field.

**Solution:** Removed the Proc. Is Lab field. This was a duplicate field.

---

131946 - Internet Logon (Patient) History window shows incorrect data

**Module:** Info Manager ~ Internet Logon (Patient) History window

**Problem:** When you run the Internet Logon (Patient) History report (by going to Info Manager window - Management tab - Internet Logon (Patient) History category - Search button), the iLog Action column shows incorrect data.

**Solution:** Fixed so that the iLog Action column shows the correct data.

---

132184 - Overdue Extensions report causes SQL error

**Module:** Info Manager ~ Overdue Extensions report

**Problem:** If you select the Overdue Extensions report (in Info Manager window - Patients tab - Overdue Extensions category), and you add any Provider, Provider Type, or Patient Provider field, running the report displays an SQL error.

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

---

132242 - A/R Reconciliation report shows incorrect allocation order

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

**Problem:** If you allocate a payment to a pre-payment, and then you re-allocate this amount from the pre-payment to a charge, axiUm (a) un-allocates the pre-payment amount and then (b) re-allocates this amount to the charge. However, if you run the A/R Reconciliation report, axiUm shows the apply-to-charge (amount from b) before the un-allocate-from-pre-pay (amount from a).

**Solution:** Fixed so that the A/R Reconciliation report shows the un-allocate-from-pre-pay amount before the apply-to-charge amount.

---

132529 - Running Appointments report takes a long time

**Module:** Info Manager ~ Appointments report

**Problem:** In some cases, if you select a pre-defined Appointments report containing several conditions (one of them being the Appointment Type column set to either Active or Checked In), axiUm takes a long time to process this report.
**Solution:** Fixed by improving the processing speed of this report.

---

**132789 - Missing category**

**Module:** Info Manager ~ Forms On File report

**Problem:** If you did not purchase the Inventory module, the Forms On File category (in Info Manager window - Clinic Mgt tab) is missing. This prevents you from running the Forms On File report.

Also, the Inventory Activity report is displayed and this is unnecessary. Without the Inventory module, there is no need to run the Inventory Activity report.

**Solution:** Fixed so that in the above scenario, the Forms On File category is available regardless whether you purchased the Inventory module.

Also in the above scenario, axiUm hides the Inventory Activity report.

---

**134414 - Patient name containing apostrophe causes error**

**Module:** Info Manager ~ Overdue Patients report

**Problem:** When you run an Overdue Patients report and a patient’s name contains an apostrophe (‘) (e.g. O’Brien), and you remove the Provider.Prov Code (Info Manager module - Patients tab - Overdue Patients category - right-click - Report Definition window), axiUm displays a Database Warning window.

**Steps to replicate:**

1. Go to the Info Manager module.

2. Click the Patients tab.

3. Select the Overdue Patients category.
4. Right-click and select the Edit Report option.
   axiUm displays the Report Definition window.


6. Click the Remove button.

7. Click the OK button.
   axiUm closes the Report Definition window and returns to the Info Manager window.

8. Click the Search button.
5.20 Bug Fixes

**Solution:** Fixed by adding an error message when Provider.Prov Code is removed from the Report Definition window. This field is required in the Overdue Patients report.

axiUm displays “This Report Requires the Provider Code field!”

---

**135118 - A/R Reconciliation report incorrect when grouped by value changes**

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

**Problem:** When you run the A/R Reconciliation report for All (not by department), and group by a transaction field, it does not show treatments with the correct grouped by value. If the treatment was added and the group by value was modified, it shows the treatment with the old (original) value rather than the new (modified) value. For example, if a treatment was added with the discipline Endo, and then modified to the discipline Ortho, when the A/R Reconciliation report is grouped by discipline, it shows the treatment as Endo instead of Ortho.

**Solution:** Fixed so that the transaction shows with the new (modified) grouped by value.

---

**135675 - Cannot add parameter to SREPORT**

**Module:** EHR ~ Estimate window

**Problem:** Cannot create custom estimates if the report requires parameters when using .NET Crystal Engine. If using CRPE Crystal Engine, the parameter dialog displays twice, but the estimate is created.
If using this Crystal Engine:  And you do the following:  This problem occurs:

CRPE  Select the Patient checkbox and click the Print button.  axiUm displays the Enter Parameter Values window (this is fine), and again when you close the Patient Signature window.

.NET  Click the Print button.  axiUm displays an error message.

**Solution:** Fixed both problems.
- axiUm displays the Enter Parameter Values window only once.
- axiUm no longer displays the error message.

---

**135934 - Search does not find second word in description**

**Module:** Inventory ~ Inventory Products List window

**Problem:** In the inventory products list (Inventory module - click on the Product field (ellipsis)), if the category description has a second word, it is not found in a search. For example, 'Mouthwash bottles' does not display when 'bottles' is entered in the Criteria field.

**Solution:** Fixed so that the search performs on any word in the description.

---

**Lab Tracking**

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**52151 - Search process excludes Lab Code field**

**Module:** Lab Tracking - Lab Cost Totals tab

**Problem:** axiUm excludes the Lab Code field from the search process.

**Solution:** Fixed so that axiUm includes the Lab Code field in the search process.

---

**129572 - Redo Lab Item icon is enabled in completed lab orders**

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

**Problem:** In the Lab Order Details window (in Lab Tracking window - Order History tab - double-click on a lab order record with a Completed status), (Redo Lab Item) is enabled. It should be disabled because you cannot redo a lab order with a Completed status.

**Solution:** Now in the above scenario, (Redo Lab Item) is disabled.
129726 - Charges button not working when lab order auto-completed

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

**Problem:** When axiUm auto-completes a lab order, the Charges button is disabled.

**Solution:** Fixed to enable the button.

---

130602 - Deleting records retain original value

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

**Problem:** In the Lab Costs window, if you enter a record, modify it, and then delete it, the Total field retains the original value even though there are no records remaining (and therefore no costs remaining).

![Lab Order Costs screenshot](image)

**Solution:** Fixed so that in the above scenario axiUm calculates the correct total.

Also, if no records are highlighted in the list view, axiUm disables (Modify Record) and (Delete Record).

---

**Maintenance**

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121586 - Merging chart not correctly merging odontogram display

**Module:** Maintenance ~ Chart Merge Utility window
Problem: When you merge patient charts, axiUm overwrites the dentition of the valid chart with the dentition of the invalid chart. This is causes axiUm to display the details of the odontogram (e.g. planned extractions) incorrectly on the merged chart.

Solution: Fixed to keep the dentition from the valid chart instead of the invalid chart.

---

**127071 - Book Accessibility should default to Read Only when granting access**

**Module:** Maintenance ~ User Accessibility for Books window

**Problem:** When you go to the User Accessibility for Books window (in Maintenance window - Scheduler tab - Books icon - Books window - Users with No Access (searched for) section to the Users with Access section, the Access drop-down field defaults to the Full Access option. This should default to the Read Only option (the lowest access level).

**Solution:** Fixed so that in the above scenario, the Access drop-down field defaults to the Read Only option.

---

**128386 - Field value changes**

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

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

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

---

**128491 - Misplaced station options item**

**Module:** Maintenance ~ Station Options window

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

---

**128880 - Importing provider schedule creates blank value**

**Module:** Maintenance ~ Provider Import window

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

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

---

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

**Module:** Maintenance ~ Procedure Code window

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

- Type: Illustrated
- Zone: Surface on Boxes

![Graphic Detail](image)

axiUm disables the Surf. Number field. This was enabled in version 5.00.

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

---

**129300 - Copying user doesn't copy Restricted Approval Definition**

**Module:** Maintenance ~ Restricted Approval Definitions window

**Problem:** When you copy user records, axiUm fails to copy entries made in the Restricted Approval Definitions window (in Maintenance window - Office tab - Users icon - Users List window - run a search - ![Edit Record] - Users window - Clinical tab - Instructors/Approvers section - Definitions button).

**Solution:** Fixed so that when you copy user records, axiUm also copies any information from the Restricted Approval Definitions window.

---

**129527 - Column shows illegible data**

**Module:** Maintenance ~ Instrument Kits List window

**Problem:** In the Instrument Kits List window (in Maintenance module - Dispensary tab - Kits icon), if you create a new kit record and add a note to it, axiUm displays illegible data in the Note column.
Solution: Fixed so that in the above scenario, axiUm displays the text properly in the Note column.

130045 - Custom reports with blank filenames causes crash
Module: Maintenance ~ Custom Reports window

Problem: If a custom report (in Maintenance window - System tab - Custom Reports icon) has a blank filename, axiUm crashes.
Solution: Fixed so that if you try saving a custom report with no filename (i.e. the File field is blank), axiUm displays an error message.

130070 - Cannot change user's preferred name
Module: Maintenance ~ Users window

Problem: In the Users window - Personal tab - Account section, if you change the value in the Preferred field and click the Save button, axiUm reverts to the original entry.
Solution: Fixed so that in the above scenario, axiUm retains the new entry.

---

**130370 - Code tables get database Id=0 on add with error then modify**

**Module:** Maintenance

**Problem:** In some Maintenance windows, in rare cases, when maintaining tables with no user-entered code field (e.g. Break Times window), you can create a database record with a sequence of zeros by selecting a line, clicking ![Add a new Record] (Add a new Record) to display the message, “Record already exists,” and then changing the record and clicking ![Modify Record] (Modify Record).

**Solution:** Fixed so that in the above scenario, axiUm no longer creates an incorrect database condition.

---

**130522 - Display issue with Provider Type Codes window**

**Module:** Maintenance ~ Provider Type Codes window

**Problem:** In the Provider Type Codes window (in Maintenance window - Office tab - Provider Type icon), switching between providers and fee guide records causes a display issue (e.g. overlapping fields).

**Solution:** Fixed the display issue.

---

**130805 - Changes to Edit Coverage Template window not saved**

**Module:** Maintenance ~ Edit Coverage Template window

**Problem:** If you go to the Edit Coverage Template window and make changes to the Item Period field, axiUm does not save this when you close the window.

**Solution:** Fixed so that changes made to this field are saved.

---

**131265 - Missing provider type description**

**Module:** Maintenance ~ Users List window

**Problem:** In the Users List window (in Maintenance window - Office tab - Users icon), clicking on the Provider Type drop-down field displays a list of provider type codes but no longer shows the associated descriptions.
Solution: Fixed so that the description displays again.

131462 - Comment Codes report shows other note code types
Module: Maintenance ~ Comment Codes report
Problem: The Comment Codes report (in Maintenance window - Transactions tab - Comment Codes icon - Comment Codes window - Print Report) is including provider scheduling note codes and contact note codes. It should display only statement and receipt codes.
Solution: Fixed to display only statement and receipt codes.

131475 - Drop-down field becomes enabled on refresh
Module: Maintenance ~ Insurance Company window
Problem: When you open the Insurance Company window for an insurance company not using EDI (the EDI Claims drop-down field shows the Not Eligible option), the Diag. code type drop-down field becomes enabled when axiUm refreshes.
Solution: Fixed so that in the above scenario, the drop-down field remains disabled.
131541 - Display issue with Medical Diagnosis List window

**Module:** Maintenance ~ Medical Diagnosis Code window  
**Problem:** There is a display issue with the Medical Diagnosis List window:

Steps to replicate:

1. Open the Medical Diagnosis List window.  
   Go to Maintenance window - Clinical tab - Medical Diagnosis Codes icon.
2. Click (Create a new Record).  
   axiUm displays the Medical Diagnosis Code window.
3. From the Type drop-down field, select the ICD-9 option.
4. From the Equivalent ICD-9 Code field, click (ellipsis).  
   axiUm appears to close the Medical Diagnosis Code window and return to the Medical Diagnosis List window. However, this is a second Medical Diagnosis List window that axiUm displays exactly on top of the first one we opened earlier.

**Solution:** Fixed by staggering the display of the Medical Diagnosis List window.

131546 - Future Dating an existing Recurring Work Schedule removes reserves

**Module:** Maintenance ~ Provider Working Schedules window  
**Problem:** If you create a new provider work schedule and create a recurring schedule, axiUm saves this. However, if you re-open the same provider work schedule and change the start date of the recurring schedule to a date in the future, axiUm does not save the changes.

**Solution:** Fixed so that in the above scenario, axiUm saves the changes made to the recurring schedule.

131654 - Options are misaligned

**Module:** Maintenance ~ Users window  
**Problem:** When you go to the Users window (in Maintenance window - Office tab - Users icon - Users List window - run a search - (Edit Record)), click on the Provider tab, and go to the Provider ID’s section, the SIN option and the TIN option are misaligned with the corresponding text box.
5.20 Bug Fixes

Solution: Fixed so that the options are aligned with the corresponding text box.

131938 - Inaccurate number of held claims to be printed

Module: Maintenance ~ Print Held Claims window

Problem: Sometimes, if a planned claim was updated and re-batched before the original claim was submitted, the To be printed field is inaccurate. It does not match the total number of claims to be printed.

Solution: Fixed so that in the Print Held Claims window (in Maintenance window - System tab - Processes icon - Processes window - Print Held button), the To be printed field is accurate.

131944 - Misleading checkbox name

Module: Maintenance ~ System Options window

Problem: The Support Citrix stations checkbox is misleading.

Solution: Renamed this checkbox to Use thin clients.

132096 - Manually entering RxNorm field leaves Note text box empty

Module: Maintenance ~ Drug Doses window

Problem: When you open the Drug Doses window (in Maintenance window - EHR tab - Drug Definition icon - Drug Definition List window - highlight a record from the list view - (Drug Doses)), and in the RxNorm field you manually enter a valid value, axiUm does not populate the Note text box with the associated note.

Solution: Fixed so that axiUm displays the associated note.
132297 - Problems merging patient charts (1)

**Module:** Maintenance ~ Chart Merge Utility window

**Problem:** If two patient records are merged and both patients have had an insurance payment allocation from the same bulk cheque, the separate Type 74 records for this insurance payment are not merged into one. This results in multiple Type 74 records for a given patient and insurance payment.

**Solution:** Fixed.

Note: Fixed all custom versions of the PATIENT_PKG in 135402.

132349 - Producer preferred name not being updated

**Module:** Maintenance ~ Users window

**Problem:** If you modify a non-student user’s preferred name, axiUm fails to update the producer table. For example, printing the appointment list still shows their previous preferred name.

**Solution:** Fixed so that in the above scenario, axiUm displays the new preferred name.

132521 - Adding instrument to kit item template causes crash

**Module:** Maintenance ~ Kit Item Templates window

**Problem:** If you add an instrument to a kit template that already contains instruments (i.e. the template is not empty), axiUm prompts to update all kits. Then when you click the Yes button, axiUm crashes.

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

132735 - Drop-down field does not save your selection

**Module:** Maintenance ~ Inventory Product window

**Problem:** The Inventory Product window’s Cost method drop-down field does not retain the option you selected.

**Steps to replicate:**

1. Open the Inventory Product window.
   - Go to the Maintenance window - Inventory tab - Products icon - Inventory Products List window - 📋 (Edit Record).
2. Go to the Product Details section.
3. From the **Cost method** drop-down field, select the LIFO option or the Average option.
   - Do not select the first option (i.e. FIFO).
4. Click the OK button to save the changes and close the Inventory Product window.
5. Re-open the Inventory Product window
   The Cost method drop-down field displays the FIFO option.

**Solution:** Fixed so that in the above scenario, axiUm retains the option you selected.

---

**132911 - Printing claims with EOBs prompts for printer twice**

**Module:** Maintenance ~ Desktop Settings window

**Problem:** If you have the following setup: In Maintenance window - System tab - Desktop Settings icon - Desktop Settings window, the Always Selecting Printer for Printing checkbox is selected. Then if you print batches of claims (by going to Maintenance window - System tab - Processes icon - Processes window - Print Held button - Print Held Claims window), and axiUm detects an EOB as an attachment to the claim printing, axiUm asks you to select the printer again (once for the claim printing, and again for the EOB).

**Solution:** Fixed so that axiUm prints the EOB on the same printer you selected to print the claim. This way you are prompted only once.

---

**133391 - Problem searching template notes by description**

**Module:** Maintenance ~ Clinical Note Codes List window

**Problem:** When you search for a template note by its description, axiUm searches for matching text in the Clinical Note Template window’s Text text box instead of the Description field.

**Solution:** Fixed to search for matching text in the Clinical Note Template window’s Description field.

---

**133540 - Procedure Codes List window not indicating sub-procedures**

**Module:** Maintenance ~ Procedure Codes List window

**Problem:** Sometimes when you open the Procedure Codes List window, parent procedures containing sub-procedures do not display a blue dot on the plus sign (+) if the parent procedure has the Graphic Detail section’s Type displaying the Text option.

**Solution:** Fixed so that all procedures with sub-procedures will be depicted with a blue dot. If the sub-procedures are steps, the dot will be red (current behavior).

---

**133602 - Cannot merge charts (1)**

**Module:** Maintenance ~ Chart Merge Utility window

**Problem:** If patientA (i.e. valid chart) and patientB (i.e. invalid chart) both contain prescriptions entered in eRx, and you merge these two charts (by going to Maintenance window - System tab - Merge Charts icon - Chart Merge Utility window), axiUm displays the message, “Error merging records, please call support.”
**Solution:** Fixed so that in the above scenario, axiUm no longer displays this message.

Note: Fixed all custom versions of the report in 135408.

---

**133799 - Icons in the Lab Tracking tab are outdated**

**Module:** Maintenance - Lab Tracking tab

**Problem:** The icons in the Maintenance window’s Lab Tracking tab need to be updated.

**Solution:** The following icons are new:

- Supplement Codes
- Material List
- Lab Cost Status Codes

Current:

![Current Icon](image1.png)

New:

![New Icon](image2.png)

---

**133966 - Deleting drug dose deletes frequencies of other drugs**

**Module:** Maintenance ~ Drug Frequencies window

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

- A drug (e.g. Tylenol 3) contains a drug dose (e.g. 1 pill) and a drug dose frequency (e.g. 1 pill twice a day).
- Another drug (e.g. Tylenol OTC) contains the same drug dose (i.e. 1 pill) and the same drug dose frequency (i.e. 1 pill twice a day).
Then when you delete the frequency of one drug, axiUm deletes the same frequency contained in the second drug.

**Solution:** Fixed so that in the above scenario, axiUm retains the drug dose frequency of the second drug.

---

**133986 - Drug Definitions report shows only one drug frequency**

**Module:** Maintenance ~ Drug Definitions report

**Problem:** When you print the Drug Definitions report (by going to Maintenance window - EHR tab - Drug Definitions icon - Drug Definition List window - ‼️ (Print Report)), axiUm shows only the first frequency of each drug dose.

**Solution:** Fixed to show all drug frequencies in the report.

---

**134090 - Invalid password is accepted**

**Module:** Maintenance ~ Password Options window

**Problem:** In the Password Options window (in Maintenance window - System tab - System icon - System Options window - System Options section - Password button), enter the following:

- Use restricted password validating: select this checkbox
- Function: In this field, enter the name of a password validation function

Then when you go to the Maintenance module - Office tab - Users icon - Users List window - run a search - ‼️ (Edit Record) - Users window - Personal tab - Account section, and in the Password field (the first Password field, the longer one of the two), and you enter an invalid password, axiUm rejects this password, and this is fine. However, if you enter another invalid password, axiUm accepts it.

**Solution:** Fixed so that in the above scenario, if you enter another invalid password, axiUm rejects this entry.

---

**134233 - Error in script**

**Module:** Maintenance ~ Copy Form Status Codes window

**Problem:** There is a "NUL" after the date field in the Copy EHR Form script.

**Solution:** Fixed so that there is no "NUL" after the date field.

---

**134334 - Merging charts show unapproved forms as approved**

**Module:** Maintenance ~ Chart Merge Utility window
Problem: When you merge a patient chart, and the chart being merged contains an EPR form (set up as one per patient) and it contains unapproved answers, the merged chart shows the form as approved although it contains unapproved answers.

Solution: Fixed so that in the above scenario, the form shows as unapproved (the indicator is blue).

134420 - Misspelled station option

Module: Maintenance ~ Station Options window

Problem: In the Station Options window - Patient / Rolodex - Card, the PatIDUnique item is misspelled.

Solution: Corrected spelling to PatIDUnique.

135226 - Not showing default medical diagnosis code type

Module: Maintenance ~ Medical Diagnosis Code window

Problem: When you open the Medical Diagnosis Code window (in Maintenance window - Clinical tab - Medical Diagnosis Codes icon - Medical Diagnosis List window - 📝 (Create a new Record)), the Type drop-down field does not default to the option set up in Maintenance window - System tab - System Options window - System Options section - Medical Diagnosis Code Type drop-down field.

Solution: Fixed to display the default option.

135253 - Message in prompt contains a hard return

Module: Maintenance ~ Form Page Definition window

Problem: If you go to the Form Page Definition window (in Maintenance window - EHR tab - EPR Form Setup window - 📊 (Form Definition) - Form Pages window - 📊 (Form Page Definition)) and change the column width and close the window, axiUm displays a prompt. There is a hard return in this message that should not be there.

Solution: Fixed by removing the hard return.

135402 - Problems merging patient charts (2)

Module: Maintenance ~ Chart Merge Utility window

Problem: This is to fix all custom versions of the report for 132297.

Solution: Fixed.
135408 - Cannot merge charts (2)
Module: Maintenance ~ Chart Merge Utility window
Problem: This is to fix all custom versions of the patient package in 133602.
Solution: Fixed.

135502 - Unnecessary checkbox
Module: Maintenance ~ Consent List window.
Problem: In the Consent List window (in Maintenance window - EHR tab - Required Consent Rules icon - Required Consent Rules window - Consent field (ellipsis)), the Only show required consents that are missing for this patient checkbox is unnecessary.
Solution: Removed the checkbox.

135551 - Overnight_std_pkg is excluding non-clinical treatments
Module: Maintenance ~ Utilities window
Problem: When you go to the Utilities window (in Maintenance window - System tab - Utilities icon) and click on the Apply Pmts button to auto-apply all unallocated payments to treatments, axiUm is excluding non-clinical treatments from this process.
Solution: Fixed so that when auto-applying unallocated payments, axiUUm applies them to non-clinical treatments also.

135745 - Problem with new EDI fields
Module: Maintenance ~ Practice Options window
Problem: In the Practice Options window’s Transactions Options section, the Warn Provider on Auto batch claim error checkbox and the Add Patient sticky note on Auto batch claim error checkbox are always selected by default in the database. If you have Auto Batch turned off (i.e. the Auto batch claim upon Patient Approvals checkbox is deselected), these two checkboxes are automatically disabled and deselected, making them appear turned off on the surface, but they are actually selected in the background. As a result, axiUUm sometimes adds sticky notes when they are not expected.
Solution: Fixed so that these checkboxes will default off for new upgrades to 5.10 and higher, and will be turned off for those clients that have already upgraded but are not using Auto-Batch on Approvals.

135957 - Deselecting “Is a procedure step” checkbox should remove step number
Module: Maintenance ~ Procedure Code window
Problem: If you set up a procedure code with the Is a procedure step checkbox deselected (to prevent axiUUm from automatically adding it when you add its parent procedure), but don’t blank out the step number, axiUUm still adds the parent step procedure.
Solution: Fixed to not add the parent procedure. Fixed so that unchecking Is a procedure step checkbox will set the step number field to zero and disable it.

136215 - Additional Info option is enabled
Module: Maintenance ~ Form Page Definitions window
Problem: After adding a heading, if you click (Create a new Record) to display a list of options, the Additional Info option is enabled. Clicking this option does nothing because you cannot add an additional info item as the child of a heading.
Solution: Fixed so that in the above scenario, the Additional Info option is disabled.

136356 - Inventory location records can be saved with space in Code field
Module: Maintenance ~ Inventory Location Codes window
Problem: You can create an inventory location code record where the Code field contains only a space. This results in a record with a blank code.
Solution: Now in the above scenario, axiUUm displays the message, “Invalid Location Code.”
136546 - Batch claim printing displays incorrect information

**Module:** Maintenance ~ claim forms

**Problem:** This problem occurs if you have a patient with three insurance policies and you submit a claim for a treatment partially paid by all of them. You write off the balance for insurance1, print the claim for insurance2, and then skip the claim printing for insurance3 (but batch it). Later when you print held claims (in Maintenance window - System tab - Processes icon - Processes window - Print Held button - Print Held Claims window - Print button), the claim form's Other Coverage section displays insurance3. It should display insurance1.

**Solution:** Fixed so that in the above scenario, insurance1 is displayed.

136606 - Incorrect check on parameter list

**Module:** Maintenance ~ Clinical Quality Measures window

**Problem:** When you add a CQM (in Maintenance window - Clinical tab - Clinical Quality Measures window), axiUm runs a query to check that the parameter list of the procedure to be used is correct. However, due to a syntax error in this check, it fails and returns an incorrect number of objects.

**Solution:** Fixed so that in the above scenario, the query returns the correct parameters.

136660 - The RxNorm List window is available only for eRx users

**Module:** Maintenance ~ Drug Doses window

**Problem:** If you purchased the eRx module but have no user access to eRx, and you open the Drug Doses window, the Rx Norm field is disabled. This prevents you from accessing the RxNorm List window.

**Solution:** Fixed so that all eRx users have access to this field.
136882 - Clinical Procedure Limits report shows incorrect data
Module: Maintenance ~ Clinical Procedure Limits report
Problem: When you run the Clinical Procedure Limits report, the Weekdays column is incorrect.
Solution: Fixed the Clinical Procedure Limits report.

136893 - Problem importing clinic time exceptions
Module: Maintenance ~ Schedule Import window
Problem: If you go to the Clinic Time Exceptions tab, and try importing a file without Available Clinic as a field (by entering 0 in the Available Clinic field), running the import process displays the message, “Invalid Clinic error”. This prevents you from importing a provider's clinic time exception to all clinics. For example, if the Provider Clinic Time Exceptions window has the Only Available in drop-down field set to No Clinic (not available), indicating that the provider is unavailable for ALL clinics, you cannot export this information to all clinics, forcing you to manually enter this provider’s exception time for each clinic.
Solution: Fixed so that in the above scenario, axiUm no longer displays this message.

137199 - Merging chart omits medical alert history records
Module: Maintenance ~ Chart Merge Utility window
Problem: When merging a patient chart, axiUm omits copying the medical alert history into the merged chart.
Solution: Fixed so that axiUm includes the medical alert history in the merged chart.

138549 - MDE EDI station options are not being recognized
Module: Maintenance ~ Station Options window
Problem: For clients using MDE (Mercury Data Exchange), axium was not formatting the EDI file with the specified Submitter and Receiver IDs.

Solution: Fixed.

---

138859 - CQM export uses incorrect year value

Module: Maintenance ~ Export Clinical Quality Measures window

Problem: When exporting CQM, axiUm uses the year value (e.g. 3) from the user records.

Solution: Fixed to use the year value (e.g. 2009) in the Export Clinical Quality Measures window’s Year field.

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**Messenger**

130309 - Auto-search not working in CC & BCC fields

Module: Messenger ~ New Message window

Problem: In the New Message window (Messenger window - (New Message)), if you click on the To field, enter a partial name, and then press the Tab key, axiUm displays a drop-down field of all names beginning with that value. Then you can press the up/down arrow keys to navigate this list, and press the Enter key to select the highlighted item. However, this only works for the To field. If you do this in the CC field or BCC field; the up/down arrow keys disallows you from navigating the drop-down options.

Solution: Fixed so that in the above scenario, you can auto-search and select from the CC and BCC fields.

---

133767 - Icon not refreshing

Module: Messenger

Problem: When you have finished reading all your unread messages, the Messenger icon on the status bar remains blue.

Solution: Fixed so that in the above scenario, the Messenger icon turns gray.

---

135877 - Inconsistent behavior of removing message recipients

Module: Messenger ~ Select Message Recipients window

Problem: When you go to the To section and double-click a user name, axiUm removes the user name from the To section and returns them to the search list. If you do the same thing in the CC section or the BCC section, axiUm retains them.
Solution: Fixed so that in the above scenario, axiUm removes the user names from their sections and returns them to the search list.

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139037 - Need the ability to enter longer text

**Module:** Messenger

**Problem:** Currently the message is limited to 4,000 characters. Need to increase this.

**Solution:** You can now enter up to 32,000 characters.

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Ortho Manager

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133070 - Right-click options are disabled

**Module:** Ortho Manager

**Problem:** When you go to the Ortho Tx History window (in Ortho Manager window - Ortho Treatment History), and from the list view you highlight a record that is an ortho appointment request (the Stat column displays O), right-clicking this record displays a list of options and they are all disabled:

- Appointment Treatments
- Schedule
- Schedule with Expert
- Change to Request

Some of these right-click options should be enabled.

**Solution:** Fixed so that in the above scenario, the following options are enabled:

- Appointment Treatments
- Schedule
- Schedule with Expert

---

134134 - Notes disappear if created with a macro procedure code

**Module:** Ortho Manager ~ Add Ortho Visit / Ortho Treatment window

**Problem:** In the Add Ortho Visit / Ortho Treatment window, create an ortho treatment record with the following details:

- **Code:** In this field, enter a macro code.
- **Is an ortho visit:** Deselect this checkbox.
- **Ortho Notes:** In this section, enter notes in the text box.
Then in the Ortho Tx History window, if you open one of these treatment records, the note is missing.

**Solution:** Fixed so that when you go to the Add Ortho Visit / Ortho Treatment window - Treatment section - Code field, and you select a macro code, axiUm disables the Ortho Notes section's Code field. After adding this macro treatment, if you open one of the specific treatment records, the Ortho Notes section's Code field is now enabled, and you can enter a note in this treatment record.

---

### 134446 - Problems entering ortho notes

**Module:** Ortho Manager

**Problem:** If you log onto axiUm as a provider (who requires no approval), and in the Add Ortho Visit / Ortho Treatment window you enter a note:

- Problem 1: axiUm displays the Approve Note window.
- Problem 2: Then later when you modify the note and approve it again, axiUm fails to update the note and retains the original note.

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

- Solution 1: The Approval window is suppressed.
- Solution 2: Changes to the ortho notes are saved.

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### Patient Attachments

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### 129486 - Blank consents are treated as complete consents (1)

**Module:** Patient Attachments

**Problem:** In some cases, axiUm fails to add a consent form, resulting in an empty consent record. In such cases, axiUm incorrectly detects these records as valid consents and stops displaying the “Consent Required” indicator on the status bar.

**Solution:** Fixed so that in the above scenario, axiUm will no longer consider these empty consents as valid and will continue displaying the “Consent Required” status bar indicator.

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### 130707 - Cancelling an action requires too many mouse clicks

**Module:** Patient Attachment ~ Enter Parameter Values window

**Problem:** If you want to cancel the Enter Parameter Values window, you must click the Cancel button on (up to) seven windows to return to the Add Patient Consent window.

**Solution:** Fixed so that if no parameters are required, clicking the Cancel button returns you to the Add Patient Consent window. If parameters are required, clicking the Cancel button displays a
message indicating that the request was cancelled, and then returns to the Add Patient Consent window. This fix reduces the number of clicks by four or more.

130962 - Inactive forms are counted
Module: Patient Attachment
Problem: axiUrn counts forms that are associated to an inactive sub-tab when displaying the total count in the Section list box. This causes the sum of the numbers shown on the tabs to not equal the number displayed on the Selection list box.
Solution: Fixed to exclude inactive forms.

132103 - Need the ability to troubleshoot empty consent files
Module: Patient Attachments
Problem: There is difficulty in troubleshooting problems in axiUm.
Solution: axiUm now has the following new station options to capture more logging information:

Setup:
1. Open the System Options window.
   Go to the Maintenance window - System tab - Stations icon - Station Codes window - (Station Options).
2. Go to General section - Office section.
3. The following items are new:
   - DBLogging
   - DBLocalLogPath
   - DBNetworkLogPath

The log files contain records for logon, logoff and DB errors (network disconnection).

134746 - Attachments can be moved to read-only sub-tabs
Module: Patient Attachment
Problem: axiUm lets you move an attachment to a read-only sub-tab.
Solution: Now axiUm displays the error message, “This user has Read Only access to the Attachment Manager sub-tab selected. Cannot Proceed!”
134925 - File attachments with no filename extension causes crash
Module: Patient Attachment
Problem: When you add a scanned consent but omit the filename extension, axiUm crashes.
Solution: Now in the above scenario, axiUm displays the error message, “Please enter a valid filename.”

136327 - Deleted records show incorrect user name
Module: Patient Attachments
Problem: If user1 adds a consent form, and then user2 deletes this record, the list view’s User column shows user2 for this record.
Solution: Fixed so that the User column displays user1.

137224 - Deleted records show incorrect user name
Module: Patient Attachments
Problem: If user1 adds an attachment (e.g. statements, letters, images, or receipts), and then user2 deletes this record, the list view’s User column shows user2 for this record.
Solution: Fixed so that the User column displays user1.

138227 - Checkbox selected by default
Module: Patient Attachments ~ Consent List window
Problem: When you open the Consent List window (e.g. from Patient Attachments window – Section list box - highlight a consent section - (Create a new Record) - Add Patient Consent window - Consent (ellipsis)), axiUm selects the Only show required consents that are missing for this patient checkbox by default. If your institution does not use required consent rules, and this checkbox is selected, axiUm shows no records in the list view and you must deselect this checkbox each time you open this window.
Solution: Fixed so that when you open the Consent List window from various areas of the application, axiUm deselects this checkbox by default.

Note: When you select to view missing required consents, axiUm selects this checkbox.

Patient Card

53964 - Additional fields added for Contact Notes & History
Module: Patient Card ~ Patient Contact Notes window
**Problem:** The Patient Contact Notes window contains disabled fields. These need to be enabled.

**Solution:** The Patient Contact Notes window (changed) now has the following enabled fields with additional changes:

- **Date:** This field is now called the Contact Date field.
- **Time:** This field is now called the Contact Time field.
- **User:** This field is now called the Contact User field.

The fields above are also changed in the Patient Contact Notes History window.

**Current:**

![Current Patient Contact Notes Window]

**New:**

![New Patient Contact Notes Window]
128602 - Non-patient guarantors are excluded from search results

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

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

**Solution:** Fixed so that search results include non-patient guarantors.

130079 - Wait List column is blank

**Module:** Patient Card

**Problem:** When you select a patient record that contains an appointment on the wait list, the Patient Card window’s Wait List column displays blank for this appointment, indicating they are not on a wait list.

**Solution:** Fixed so that if the selected patient is on a wait list, the Patient Card window’s Wait List column displays Yes.

131632 - Deleting patient retains their internet access account

**Module:** Patient Card

**Problem:** When you delete a patient record, their internet access account is retained.

**Solution:** Fixed so that deleting a patient record also deletes their internet access account.

132043 - Incorrect values in Dependents History window

**Module:** Patient Card ~ Dependents History window

**Problem:** When you modify patient dependent information, axiUm does not always record the changes correctly in the Dependents History window (e.g. field values do not reflect the actual entries made, or the records are duplicated).

**Solution:** Fixed so that axiUm records changes correctly.
132049 - Remove horizontal scroll
Module: Patient Card
Problem: The horizontal scrollbar is unnecessary and can be removed.
Solution: Removed the horizontal scrollbar.

132251 - Patient deductible is reset
Module: Patient Card ~ Dependents window
Problem: axiUm lets you enter the following:
- A patient deductible balance greater than the policy patient deductible.
- A family balance greater than the family deductible.
- A policy deductible balance greater than the item deductible.
Solution: Fixed to prevent you from doing the above.

135035 - Display issue with Patient Card window
Module: Patient Card
Problem: If both your Windows and axiUm resolution is set to 1280 x 800, the Patient Card window displays scrollbars.
Solution: axiUm resizes so no scrollbars display.

135724 - The Patient History Report is empty
Module: Patient Card ~ Patient History report
Problem: This problem occurs if you select an existing patient record with no previously entered custom information. If you enter custom information (by going to Patient Info window - Codes tab - Custom Info section, enter a value in a field, and click the Save button), and then you open the Patient History report (by going to the History button - Patient History window - Preview Report), the report is empty.
Solution: Fixed so that in the above scenario, the Patient History report displays information on the custom values.

136831 - axiUm auto-selects employers for multi-subscriber plans
Module: Patient Card - Insurance tab
Problem: When you change the policy holder on a multi-subscriber plan, axiUm auto-selects the employer. However, this policy holder may have other primary employers different from the one axiUm selected.
Solution: Fixed so that when you change the policy holder, the Employer drop-down field remains blank.

136935 - Changing policy holder not updating coverage

Module: Patient Card

Problem: This problem occurs in the following situation:

If you transfer the policy holder of insurance1 from Mom to Dad, axiUm fails to transfer the insurance coverage. This means Mom, Child 1, and Child 2 remains covered under insurance1, and Child 3 remains covered under insurance2 only.

Solution: Fixed so that in the above scenario, axiUm transfers the insurance coverage to the new policy holder, and their dependents receive coverage from this policy. This means that in our example, Mom, and Child 1 no longer receive coverage from insurance1; Child 2 and Child 3 are now covered under both insurance1 and insurance2.

Patient Care

133167 - Report attaches to previously selected patient

Module: Patient Care

Problem: If you open the Patient Care module and run a report for patient1, and while the report is open you select patient2, axiUm updates the report to reflect patient2, and this is fine. However, if you attach this report to the current patient (i.e. patient2) axiUm attaches it to patient1 and the data in this report also reflects patient1.

Solution: Fixed so that in the above scenario, axiUm attaches the report to patient2 and the content also reflects patient2.

Perio Chart
126356 - Adding grouped procedure causes incorrect error

**Module:** Perio Chart ~ Add Treatment window

**Problem:** In some cases, when you add procedure code that is part of a procedure group, axiUm displays an error message.

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

---

**Personal Planner**

126283 - Search speed is slow

**Module:** Personal Planner - Assigned Forms tab

**Problem:** When you select the Include User's Previous Assignments checkbox and run a search, axiUm takes a long time to process.

**Solution:** Fixed by improving the search speed.

---

130975 - Setting default tab causes crash

**Module:** Personal Planner

**Problem:** In some cases, if you set up a default tab (in Maintenance window - System tab - Custom Reports icon - Custom Reports window - (Level Access) - Report Access window, the Is Default checkbox is selected) and you open the Personal Planner module, either axiUm fails to open the report or the application crashes.

**Solution:** Fixed so that in the above scenario, axiUm displays the default report (i.e. tab).

---

132381 - Closing the Edit Form Information window causes crash

**Module:** Personal Planner ~ Edit Form Information window

**Problem:** When you open the Edit Form Information window (in Personal Planner window - Assigned Forms tab - run search - highlight item from list view - right-click - Edit Form Information option) and then immediately click the OK button, axiUm crashes.

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

---

134035 - Deleting a deleted form displays an SQL error

**Module:** Personal Planner

**Problem:** Deleting a deleted form causes an SQL error.

**Solution:** Fixed so that axiUm does not display an SQL error.
137487 - Problem adding user forms to multiple users

**Module:** Personal Planner - Assigned Forms tab, User Forms window

**Problem:** If the User Form Setup window (in Maintenance window - Office tab - User Form Setup icon) has the **Can have multiple forms per user** checkbox selected, adding this form to another user displays the message, "Another user has already answered this form. Your answers will be lost." This prevents you from adding this form to multiple users.

**Solution:** Fixed so that in the above scenario, a single form can be added to multiple users.

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**PowerAdmin**

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128263 - Menu item not working

**Module:** PowerAdmin

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

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

---

128680 - Rolodex right-click options are unavailable

**Module:** PowerAdmin

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

**Setup:**

1. Open axiUm.
2. Open the Station Options window.
   
   Go to the Maintenance module - System tab - Stations icon - Station Codes window - (Station Options).
3. Go to General section - Menu - section HideDisabledMenus item.
4. In the Current Value field, enter 1 (Yes).
5. Click (close).  
axiUm closes the Station Options window and returns to the Maintenance module.

Steps to replicate:
1. From the PowerAdmin main window, go to the first drop-down field and select the Level option.
2. From the second drop-down field, select an option. For our example, we will select the Rolodex - Read Only option.  
   Make sure this role is defaulted to No Access by going to the File menu - Roles option - Roles window and make sure the Default Rights drop-down field displays the No Access (all red) option.
3. Go to the Menus section - Rolodex section - Rolodex item. Make sure some checkboxes are selected for access to these fields.
4. From the PowerAdmin main window, go to the first drop-down field and select the Role option.

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

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

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

8. Open the Rolodex module and right-click anywhere. axiUm displays no right-click menu options.

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

---

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

**Module:** PowerAdmin

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

**Setup:**

1. Open axiUm.
2. Open the Station Options window.
   
   Go to the Maintenance module - System tab - Stations icon - Station Codes window - Module: PowerAdmin.

   (Station Options).
3. Go to General section - Menu - section HideDisabledMenus item.
4. In the Current Value field, enter 1 (Yes).

5. Click ✗ (close).

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

Steps to replicate:
1. From the PowerAdmin main window, go to the first drop-down field and select the Level option.
2. From the second drop-down field, select an option.
3. Go to the Menus section - EHR section - Chart item. Make sure all the Select Teeth type checkboxes are selected for access to these fields.
4. From the PowerAdmin main window, go to the first drop-down field and select the Role option.

5. From the second drop-down field, select an option. For our example, we will select the EHR/Pat Attach - Read/Write option.
   Make sure that this role is defaulted to No Access by going to the File menu - Roles option - Roles window and making sure the Default Rights drop-down field displays the No Access (all red) option.

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

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

8. Go to the EHR window’s Odontogram section and right-click.
   axiUm displays no Select Teeth option or its sub-options.

   Solution: Fixed so that in the above scenario, axiUm displays these right-click menu items.
129100, 129687 - Missing controls

Module: PowerAdmin ~ Completing Treatment on Future Appointment Warning window

Problem: (129100) In the Completing Treatment on Future Appointment Warning window (in Dialogs - SHARED - Miscellaneous - Miscellaneous Warnings), the (close) is missing, preventing you from closing this window. The workaround is to press ESC.

(129100) The (close) is also missing from the following PowerAdmin windows:

- Auto Update Other Provider Entries Warning window
- Renew Benefit Plan Warning window
- Delete Additional Benefit Plans window
- Auto Reset Other Provider Entries Warning window
- Select Other Recalls Question window
- Appointment Treatments Access Warning window
- Edit Clinic Time Reason Question window
- Undo Cancel/Fail window
- Completing Treatment on Future Appointment Warning window

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

(129100) All other PowerAdmin windows listed above now displays the (close) icon.
129230 - Factoring Co field is missing

**Module:** PowerAdmin

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

**Solution:** Fixed to display this field.

---

129689 - Inconsistent fonts

**Module:** PowerAdmin ~ Charting Method Setup window, Drug Definition window

**Problem:** The following windows use a different font from other PowerAdmin windows.

Charting Method Setup window:
Drug Definition window:

The correct font to use, for example, is the one displayed in the Chart Tracker window.
Solution: Fixed so that in the above scenario, axiUm uses the correct font for the following windows:

Charting Method Setup window:

![Charting Method Setup window]

Drug Definition window:

![Drug Definition window]
129690 - Opening window causes error message

**Module:** PowerAdmin

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

**Steps to replicate:**

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

2. In the Criteria field, enter Patient Deductible with Family Max. Warning.
3. Click the Search button.
   axiUm displays the search result in the list view.

4. Click the Go To button.
   axiUm displays the ObjectWindows Exception window.

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

129692 - Outdated title bars
Module: PowerAdmin
Problem: The following window titles need to reflect the current axiUm window titles:
- TxPlan Warning (Add for another provider)
- X-ray Details
- X-ray Information should be replaced with X-Ray Information

Solution: Renamed the above windows to the following:
- Tx Plan Warning (Add for another provider)
- X-Ray Details
130081 - Problems with warning windows

**Module:** PowerAdmin ~ Services Not Covered Warning (for Planned), Services Not Covered Warning (for Complete/In Process Txs)

**Problem:** In Dialogs - MAINTENANCE - Shared, there are the following windows:

- Services Not Covered Warning window

![Services Not Covered Warning](image)

- Services Not Covered Warning (for Complete/In Process Txs) window

![Services Not Covered Warning (for Complete/In Process Txs)](image)
There are a number of problems with these windows:

- These windows are placed in the incorrect location.
- The Services Not Covered Warning window should be called Services Not Covered Warning (for Planned) window so that the naming convention is parallel with the Services Not Covered Warning (for Complete/In Process Txs) window.
- The Services Not Covered Warning (for Complete/In Process Txs) window lets you set security on the upper text box. This is just the warning text, and no other warning window in PowerAdmin lets you set security on the warning text.

**Solution:** Fixed by making the following changes:

- These windows should be located in Dialogs - SHARED - Treatment Related.
- The Services Not Covered Warning window was renamed to the Services Not Covered Warning (for Planned) window.
- Removed the security setting from the Services Not Covered Warning (for Complete/In Process Txs) window’s upper text box.

---

**130099 - The Change Password window is not working**

**Module:** PowerAdmin ~ Change Password window

**Problem:** If you go to the Change Password window (in Dialogs - OTHER - Change Password) and you make the fields and buttons read-only (i.e. yellow), the Change Password window in axiUm is still enabled. Note that this works fine if you access the window by going to the Tools menu and selecting the Change Password option.

**Solution:** Fixed so that in the above scenario, axiUm disables these fields.
130444 - Settings are not working

Module: PowerAdmin ~ Patient Appointments window, Family Appointments window

Problem: In the Patient Appointments window and the Family Appointments window (in PowerAdmin window - Dialogs - SCHEDULER - Patient Appointments or Family Appointments), you cannot set the security on the Schedule button or the Reschedule button.

Solution: Fixed so that you can set the security on these buttons.

130601 - Lost the ability to copy user level

Module: PowerAdmin

Problem: When we added the ability to create roles (in version 5.10.00, enhancement 78348), we lost the ability to copy user levels. Need to restore the ability to copy user levels.

Solution: Fixed. Now the Levels window has a Copy button (new).

Current:  

New:

131907 - Incorrect ID and field ID pointing to checkbox

Module: PowerAdmin
Problem: If the Info Manager branch - Tables section - Patient item, shows the Pt. Resp. Id# field is as red, and you go to Info Manager window - Patient List Category, the Patient Type option in the list view is disabled.

Solution: Fixed to control the correct report field access, not the Patient Type checkbox.

132182 - The Eligibility button is missing

Module: PowerAdmin ~ Patient Insurance window

Problem: This affects US version only. When you open the Patient Insurance window (in PowerAdmin window - Dialogs - PATIENT AREA - Patient Insurance), the Eligibility button is missing.

Solution: The Eligibility button is now shown.
132461 - Template Notes not obeying PowerAdmin settings

Module: PowerAdmin

Problem: If your user level contains a role where the default rights are set to No Access (all red), and you go to the EHR module and open a template note, the answer fields are disabled.

Solution: Fixed so that in the above scenario, the answer fields are enabled.

135654 - Strange display of the Lab Order EPR Forms window

Module: PowerAdmin ~ Lab Order EPR Forms window

Problem: In Dialogs - LAB TRACKING - Lab Order EPR Forms, if you disable the Suspended label for your role, and in axiUm you open the Lab Order EPR Forms window, this window does not display correctly. For example, questions are missing, buttons appear in the wrong location, and some fields and buttons are hidden.

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

135852 - Need to rename the Received Message window

Module: PowerAdmin ~ View Sent/Received Message window (renamed)

Problem: Going to Dialogs - MESSENGER - View Message displays the Received Message window.

- The name of the tree item and the window it opens are mismatched.
- This window name is too generic; it applies to viewing only sent and received messages

**Solution:** Made the following fixes:
- Renamed the above tree item from View Message to View Sent/Received Message.
- This window title has been renamed from Received Message to View Sent/Received Message.

---

136168 - Control for Summary option causes display problems

**Module:** PowerAdmin ~ Patient Assignments window

**Problem:** When you go to Dialogs - PATIENT ASSIGNMENT - Patient Assignments, and from the Patient Assignments window you set the Summary option to read-only, the corresponding Patient Assignments window in axiUm does the following:

- Selecting the Detail option causes the Summary option (selected by default when you open the window) to remain selected.
- The Criteria button is disabled (which corresponds to the Summary option when selected).
- Displays the Need Summary tab (which corresponds to the Summary option when selected).

**Solution:** Fixed so that:
- Selecting the Detail option deselects the Summary option.
- The Criteria button is enabled.
- Displays the tabs corresponding to the Detail option (i.e. the Patient tab, the Patient Need tab, and the Planned Tx tab).

---

137147 - Missing window

**Module:** PowerAdmin ~ Step Parent Update Steps Warning window

**Problem:** The Step Parent Update Steps Warning window is missing.

**Solution:** The Step Parent Update Steps Warning window is now available in Dialogs - ELECTRONIC HEALTH RECORD (EHR) - Chart Warnings - Step Parent Update Steps Warning.
137154 - Date remains in Status Bar

Module: PowerAdmin ~ Status Bar window

Problem: In 5.11.00, the Date indicator was removed from the Status Bar but was not removed from the same window in the PowerAdmin module (in Dialogs - OTHER - Status Bar).

Solution: Fixed by removing it.

137155 - Checkbox cannot be selected

Module: PowerAdmin ~ Transaction Payments window

Problem: In Dialogs - TRANSACTIONS - Transaction Payments window, there is an Include Guarantors' Payments for Other Patients checkbox that is hidden by the list view.

Solution: Fixed so that this checkbox is visible.

137465 - Incorrect field control type

Module: PowerAdmin ~ Appointment Request window

Problem: When you go to Dialog - PERSONAL PLANNER - Appointment Request, the Time field lets you to change the time.
**Solution:** Fixed so that this field displays the correct control type (i.e. red/green/yellow).
137605 - Spreadsheet question right-clicks are unavailable

Module: PowerAdmin

Problem: Missing the following right-click options for spreadsheet columns in EPR forms:
- Add Column
- Edit Column Label
- Delete Column

Solution: Now when you go to Menus - Shared - EPR Form Spreadsheet (new), the above right-click options are available.

129417 - Window message is grammatically incorrect

Module: Rolodex ~ Patient Approvals window
**Problem:** When you approve a patient using NY Medicaid insurance and axiUm displays the Extra Visit Authorization window, the message is unclear.

**Solution:** Fixed by clarifying the message.

---

**129418 - Misleading warning message when in patient approvals**

**Module:** Rolodex ~ Patient Approvals window

**Problem:** The Auto Batch Claim Error Warning window displays the message, “The EDI claim for patient has validation errors. Please have the patient see a staff member at check-out,” even if the actual error had nothing to do with the patient.

**Solution:** Fixed so that in the above scenario, axiUm omits the last sentence of the message.

---

**129419 - Unnecessary Cancel button**

**Module:** Rolodex ~ Patient Approvals window

**Problem:** The Auto Batch Claim Error Warning window displays a Cancel button. Because you approved the treatment already, you cannot cancel anything, and clicking this button does nothing.

**Solution:** Fixed to display only the OK button.

---

**129420 - Limited visit insurance creates multiple claims for same-day, non-covered txs**

**Module:** Rolodex ~ Patient Approvals window

**Problem:** In the following scenario:
- A patient has limited visit insurance.
- The patient ran out of the number of covered visits.
- Several treatments are approved and billed to the patient.

When all of the above occurs, axiUm adds each treatment to a separate claim.

**Solution:** Fixed to add treatments to the same claim (billed to the patient). In other words, the behavior is consistent with what approving the same treatment for a patient with no insurance.

---

**129616 - Tooth site description in Tooth Notes is sometimes blank**

**Module:** Rolodex ~ Patient Approvals window

**Problem:** When you add a general note for a hard tissue or soft tissue site, and then you approve this note, the Description is blank.
**Solution:** Fixed so that in the above scenario, the Description displays, "**Note**" like all other general notes.

---

**130016 - Blank consents are treated as complete consents (2)**

**Module:** Rolodex

**Problem:** In some cases, axiUm fails to add a patient consent form, resulting in an empty consent record. In such cases, axiUm incorrectly detects these records as valid consents and fails to activate the chart lock. This means axiUm will let you access patient charts when you should be disallowed from doing so.

**Solution:** Fixed so that in the above scenario, axiUm will no longer consider these empty consents as valid and will activate the chart lock as if no consent form exists.

---

**130066 - Searching on Contact Phone takes a long time**

**Module:** Rolodex

**Problem:** If you set up the Rolodex module to search on patient records based on their contact phone number (in the Rolodex Options window - Rolodex Section, the Optional Display Field (1-10) displays the Contact Phone option), and you run a search (on either contact phone numbers or all phone numbers), axiUm takes a long time to return search results.

**Solution:** Fixed by improving the speed of the search process.

---

**130096 - Using custom field displays Database Warning window**

**Module:** Rolodex ~ Guarantor Rolodex window.

**Problem:** If you select a custom field in the Rolodex settings, searching for a guarantor record displays the Database Warning window

**Setup:**

1. Open the Patient Options window.

   Go to Rolodex window - (Options/Settings).
2. Go to the Rolodex section, and in the fields Optional Display Column (1-3) drop-down fields, select a custom patient field. For our example, we will go to the Optional Display Column 1 drop-down field and select the Pt. Custom Date 1 option.

3. Click the OK button.
   axiUm saves the changes, closes the Patient Options window, and returns to the Rolodex window.

Steps to replicate:

1. Open the Patient Info window.
   Go to Rolodex window - patient selection list - highlight a record - (Edit Patient).

2. Click the Guarantor tab.

3. Click (Clear Data).
   axiUm clears the user-entry fields.

4. Go to the Guarantor Information section and click on the Title field (ellipsis).
   axiUm displays the Guarantor Rolodex window.

   ![Guarantor Rolodex Window]

5. Run a search.
   axiUm displays the Database Warning window.

   ![Database Warning Window]

Solution: Fixed so that in the above scenario, axiUm no longer displays the Database Warning window.
130263 - Refresh issue when changing patient name

**Module**: Rolodex

**Problem**: When you change the name of a patient (displayed on the patient selection list), axiUm does not update their name. If you refresh the window by closing and re-opening the Rolodex window, axiUm displays the updated name.

**Solution**: Fixed refresh problem.

---

130310 - Refresh issue when updating provider assignment

**Module**: Rolodex

**Problem**: When you go to the patient selection list and highlight a patient name, and you assign a provider to this patient, axiUm does not update the provider assignment information in the patient information section (top pane). If you refresh the window by closing and re-opening the Rolodex window, axiUm displays the updated information.

**Solution**: Fixed refresh problem.

---

130802 - Custom fields are enabled when approving note deletion

**Module**: Rolodex ~ Approve General Note (Deletion) window

**Problem**: When you approve the deletion of a note, the custom fields are enabled.

**Solution**: Fixed by disabling all fields in the Approve General Note (Deletion) window.

---

131125 - Added patient records are not audited properly

**Module**: Rolodex ~ Patient History window

**Problem**: When you created a patient record, axiUm does not audit this properly. In other words, the Patient History window (in Patient Info window - History button) axiUm fails to display the Added-type history record.

**Solution**: Fixed so that axiUm correctly audits the creation of patient records. Also, axiUm now has a script to correct bad data, so that records that previously appeared to be missing now displays the user of the overnight package.

---

132835 - Misspelled window title

**Module**: Rolodex ~ Print Dispensary Request Question window

**Problem**: In the Print Dispensary Request Question window, the word Dispensary is spelled Dispensary.

**Solution**: Fixed typo.
132848 - axiUm could lockup temporarily during patient approvals  
**Module**: Rolodex ~ Patient Approvals window  
**Problem**: This problem occurs when user1 (who requires approval) on workstation1 opens a treatment record, while at the same time, user2 on workstation2 opens the same record and adds a pre-authorization number. When the pre-authorization number is added, workstation1 displays an hourglass and user1 is locked out (i.e. cannot do anything in axiUm).  
**Solution**: Fixed so that in the above scenario, axiUm no longer locks out workstation2.

133277 - Evaluation form not displaying when Note approval cancelled  
**Module**: Rolodex ~ Patient Approvals window  
**Problem**: When there are treatments and notes to be approved in Patient Approvals, and the Instructor clicks the Cancel button in the Note window during the approval process, the grading window does not appear. The treatment then must be evaluated in the Evaluations module later on. This causes workflow disruption and treatments to remain unevaluated.  
**Solution**: Fixed so that when you click the Cancel button on a note during approval, axiUm displays the Abort Approval Process Question window containing the message, "The approval process has been cancelled. Select Stop if you want to cancel this process (which would prevent grading if appropriate) or select Continue to resume." This gives you the opportunity to continue to grade (assuming the treatment requires grading).

133598 - Invalid Swipe message  
**Module**: Rolodex ~ Patient Approvals window  
**Problem**: When approving a planned treatment, if the following conditions are met:  
- Your card logon, card password, or both contain at least one space (e.g. 67 8).  
- In either the Billing Order list view or the Charted list view, you highlight a record.  

Then when you approve the planned treatment record, axiUm displays the message, "Invalid Swipe".

**Solution**: Fixed so that in the above scenario, axiUm no longer displays this message.
133968 - Removing chart lock still displays chart lock icon

**Module:** Rolodex

**Problem:** If a patient has a chart lock, and you select to remove this lock (by going to the Rolodex window’s patient selection list and selecting the No Chart Locks right-click option), axiUm still displays the chart lock icon in the status bar.

**Solution:** Fixed so that in the above scenario, axiUm removes the chart lock icon from the status bar.

134175 - Running search displays the Database Warning window

**Module:** Rolodex ~ Rolodex (Select Patient) window

**Problem:** If you have Rolodex set up to display the Policy # column (in the Rolodex window’s Patient Options window – Rolodex section, one of the Optional Display Column drop-down fields displays the Policy # option), and you open the Rolodex (Select Patient) window (by going to the Patient menu and clicking the Select Patients option), clicking on the Policy # column heading displays the Database Warning window.

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

137919 - Missing right-click option in Rolodex search list

**Module:** Rolodex

**Problem:** If you are a user who is restricted to viewing only assigned patients, and you go to the Rolodex search list and right-click to display a list of options, axiUm shows a blank where the Exclude Free Access Patients option is located.

**Solution:** Fixed to display this option.

138511 - Display area shows incorrect patient balance

**Module:** Rolodex ~ Patient Options window

**Problem:** In the Patient Options window, the patient balance can be selected as an optional field to display on the Rolodex window’s display area. When payments made by guarantors are split between many family members, sometimes the patient balance calculated wasn’t matching the patient balance displayed on the Transactions window’s General tab.

**Solution:** Fixed to display the correct amount as is displayed in the Transactions window’s General tab.

Scheduler
117358 - Deleted treatment records are shown
Module: Scheduler ~ Appointment Treatments window

Problem: When you add a planned treatment to an appointment record and then you delete the planned appointment, axiUm still shows the appointment record in the Appointment Treatments window.

Steps to replicate:
1. In the Scheduler module, book an appointment for a patient.
2. Right-click on the appointment block to display a list of options.
3. Select the Appointment Treatments option to display the Appointment Treatments window.
4. From the Planned Treatments list view, highlight a treatment record and click ➔ (right arrow) to move the record to the Appointed Treatments list view.
5. Click the Close button to close the Appointment Treatments window and return to the Scheduler window.
6. Go to the EHR window’s Tx History tab.
7. Delete the planned treatment you added to the appointment.
8. Return to the Appointment Treatments window. axiUm still shows the deleted treatment.

Solution: Now in the above scenario, the planned treatment record you delete from the EHR module’s Tx History tab is also deleted from the Scheduler module's Appointment Treatments window.

127183 - Rebooking causes crash
Module: Scheduler

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

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

128623 - Deselecting checkbox causes Invalid Refresh time error
Module: Scheduler ~ Scheduler Options window

Problem: In the Scheduler Options window, axiUm validates disabled fields.

Steps to replicate:
1. Open the Scheduler Options window.
2. Go to the Scheduler Type section and enter the following fields and options:
   - Chair: Select this option.
   - Indicate Late Patients: Select this checkbox. This enables the Refresh Every __ seconds checkbox.
   - Refresh Every __ seconds: In this field, enter an invalid value (i.e. outside the numeric range of 10 - 600). For our example, we will enter 601.

3. Deselect the Indicate Late Patients checkbox.
   This disables the Refresh Every __ seconds checkbox, but the value you entered remains in the disabled field.

4. Click the Accept button.
   axiUm displays a message indicating that the value you entered is outside the valid range.
Because this field is disabled, axiUm should not run a validation check for it.

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

### 128656 - Unavailable chairs not displaying correctly

**Module:** Scheduler - Active tab

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

**Setup:**

1. Create a book with the following setup:
   - Book by chair
     - In the Books window, the **Book for selected** drop-down field displays the Chairs options.
   - Book has no reservations
     - In the Books window, the **Book has reservations** checkbox is deselected.

   ![Books window showing book setup options](image)

2. Set up the Scheduler module to display in Book mode.
   - In the Scheduler Options window's Scheduler Type section, the Book option is selected.
Then when you go to the Chair tab and make the chair unavailable (by right-clicking and selecting the Make Unavailable option), the associated column in the Active tab remains beige.

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

---

**129082 - Duplicate records**

**Module:** Scheduler ~ Family Appointments window

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

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

Note: This is a display issue only, and the appointments are not double-booked.

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

---

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

**Module:** Scheduler ~ Rolodex (Select Patient) window

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

**Solution:** Fixed so that in the above scenario, axiUm no longer crashes or closes the Rolodex (Select Patient) window.
129580 - Problems booking reserved time after importing schedules
Module: Scheduler ~ New Appointment window
Problem: In some cases, when you import provider work schedules, axiUm cannot find the correct chair reservation records.
Solution: Fixed so that you can book appointments for any reserved chair’s available time.

130008 - Confusing message for subsequent patient sign-ins
Module: Scheduler - Active tab
Problem: When a patient has two appointments booked for the same day but different times, and they have already signed in for their first appointment, signing them in for their second appointment displays the message, “Patient Sign In already done for this appointment.” This message is confusing.
Solution: Fixed so that in the above scenario, the second message displays, “The patient has already been Signed In for this or another appointment.”

130009 - Confusing message for early sign-ins
Module: Scheduler - Active tab
Problem: When a patient has an appointment later in the day, signing in too early displays the message, “No appointment found that requires patient sign in.”
Solution: Fixed so that in the above scenario, axiUm displays the message, “There is either no appointment found that requires the patient to be Signed In or it is too early to Sign In this patient.”

130266 - Yellow hovering appointment block hidden from 2nd monitor
Module: Scheduler - Active tab
Problem: If you open axiUm on a secondary monitor (same workstation), axiUm does not display any yellow hovering appointment blocks until you close the Scheduler module and re-open it.
Solution: Fixed to display yellow hovering appointment blocks.

130424 - Unavailable time blocks shown as available
Module: Scheduler - Active tab
Problem: If you are using the book method of scheduling and you make a time block unavailable, axiUm retains the beige background (indicating they are still available). This is a display issue and the column still behaves correctly as if the chair is unavailable.
Solution: Fixed so that in the above scenario, axiUm displays the columns in gray (indicating they are unavailable).
130449 - Planned procedures disappear when window is re-opened

**Module:** Scheduler ~ Appointment Treatments window

**Problem:** If you go to the Appointment Treatment window and add a procedure (by using the Planned Procedure field and clicking the [right arrow]), axiUm displays the planned procedure record in the list view, and this is fine. However, if you close and re-open the Appointment Treatments window, this record disappears from the list view.

**Solution:** Fixed so that in the above scenario, axiUm retains the planned procedure record in the Appointed Treatments list view.

---

130536 - Window loses focus

**Module:** Rolodex ~ Electronic Chart Lock Warning window, Edit Notes window

**Problem:** If you go to the patient list, and hold the mouse button down long enough on a patient record (containing either a chart lock or a sticky note), when axiUm displays the Electronic Chart Lock Warning window or the Edit Notes window, this window loses focus (it is no longer the active window). Clicking on it does nothing, and you are unable to close the window.

**Solution:** Fixed so that in the above scenario, axiUm retains focus on these windows.

---

130554 - CreateDate not getting updated from T3 IVR

**Module:** Scheduler ~ Appointment Expert window

**Problem:** When an appointment is booked, the APPOINT.CreateDate database field should be updated to the current date from the axiUm server. This was happening for appointments booked in axiUm but not for appointments booked via the T3 IVR. Instead, the creation date of the original planned appointment was being kept.

**Solution:** Now, when an appointment is booked from the T3 IVR (using the ScheduleAppointment function in the T3 IVR web interface) the APPOINT.CreateDate field is updated to the server date.

---

130899 - Speed issues

**Module:** Scheduler - Active tab

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

- You are using the book method of scheduling
  
  In Scheduler window - ![Options/Settings] - Scheduler Options window - Scheduler Type section, the Book option is selected.

- The book has no reservations
  
  In Maintenance window - Scheduler tab - Book icon - Books window, the **Book has reservations** checkbox is deselected.
Then when you place the cursor on a time block, axiUm is slow to respond.

Solution: Fixed so that in the above scenario, axiUm runs faster.

130984 - Yellow hovering appointment blocks become hidden
Module: Scheduler - Active tab
Problem: If you used workstationA (wide screen or high resolution) to cancel an appointment and then you rescheduled this appointment (change to a yellow hovering appointment block), and then moved this appointment block to edge of the screen, axiUm remembers the XY co-ordinates of this screen's location. Then if you go to workstationB (regular screen or low resolution) and open the same Scheduler window's Active tab, axiUm displays the appointment block on the original XY co-ordinates, which no longer fits on the current screen. This makes the appointment block appear to be missing.
Solution: Fixed so that in the above scenario, for workstationB, axiUm displays the yellow hovering appointment block on the top left area of the Scheduler window.

131064 - Order of search criteria affects search results
Module: Scheduler ~ Appointment Expert window
Problem: If a provider has an ideal day schedule containing two enforced “prefer to do” disciplines, axiUm may or may not display search results depending on which discipline you enter in the Appointment Expert window's search criteria.
Solution: Fixed so that in the above scenario, the search results are identical regardless of which discipline you enter in the search criteria.

131544 - Search results offer dates earlier than the “not before” date
Module: Scheduler ~ Appointment Expert window
Problem: If you plan an appointment for a planned treatment, and you also indicate a “not before” date for this appointment, and then you use the Appointment Expert window to search for available appointment blocks, the search results show appointments for dates earlier than the “not before” date.
Solution: Fixed so that in the above scenario, axiUm does not offer dates earlier than the “not before” date.

131726 - Booking appointment causes crash
Module: Scheduler - Weekly tab
Problem: In some cases, if you try booking an appointment (by double-clicking on an empty appointment block and entering appointment details in the New Appointment window), axiUm appears to crash (i.e. existing appointments display strangely). If you exit axiUm and log back in,
the appointment you created is displayed as a yellow hovering appointment block instead of a booked appointment.

**Solution:** Fixed so that in the above scenario, axiUm books the appointment.

---

### 132102 - appoint.rpt is missing appointments tied to treatment (1)

**Module:** Scheduler

**Problem:** If a provider has two appointments (each with treatment records attached), for the same date and time, and in the same clinic and chair, the Print Appointment List report displays the attached treatments for only one of the appointments.

**Solution:** Fixed so that in the above scenario, axiUm displays the attached treatments for both appointments in the report.

Note: Fixed all custom versions of the report in 135405.

---

### 132174 - Linking recalls to hygiene appointment causes crash

**Module:** Scheduler

**Problem:** In some cases, if you create an active hygiene recall type appointment and then you link it to an active hygiene recall-type appointment, axiUm either displays an incorrect warning message or crashes.

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

---

### 132467 - Right-clicking on appointment block causes crash

**Module:** Scheduler - Active tab

**Problem:** If you right-click on a yellow “floating” appointment block to display a list of options, and during this time axiUm refreshes the screen, selecting an option (e.g. the Notes option) causes axiUm to crash.

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

---

### 132489 - Display problem with clinic holidays

**Module:** Scheduler - Active tab

**Problem:** If you are viewing the Active tab on a date defined as a clinic holiday, axiUm displays incorrect number of columns and the columns display incorrect providers.

**Solution:** Fixed.
132558 - Change in behavior when displaying clinic holidays
Module: Scheduler - Weekly tab
Problem: If you enter a clinic holiday for all clinics, and you go to the Scheduler window’s Weekly tab, axiUm shows no holidays. Then if you select a provider with a chair already booked in that clinic, axiUm displays the clinic holidays.
Solution: Fixed so that axiUm displays clinic holidays when you go to the Scheduler window’s Weekly tab.

132657 - Strange display when adding appointment to wait list
Module: Scheduler - Active tab
Problem: When you add an appointment in the Active tab, and select the Add to Wait List right-click option to display the Add to Wait List window, and then you click the OK button, axiUm momentarily displays the Appointment Note window in the background.
Solution: Fixed so that in the above scenario, axiUm does not display the Appointment Note window.

132877 - Chart Request right-click option causes crash
Module: Scheduler - Active tab
Problem: Sometimes, if you are using the Book method of scheduling, and you select the Chart Request right-click option at the same time the screen refreshes, axiUm crashes.
Solution: Fixed so that in the above scenario, axiUm no longer crashes.

132930 - User restrictions on editing appointments not being applied
Module: Scheduler - Chair tab
Problem: This problem occurs if you are using the chair method of scheduling. If your user rights are limited to editing appointments made by yourself, you can still move appointments made by other users.
Solution: Now in the above scenario, axiUm displays the message, “The reserved chair has one or more appointments that were booked by another user. Cannot proceed!”

133081 - axiUm using incorrect date for the Appointments report
Module: Scheduler ~ Appointments report
Problem: If you open your appointment book to a date that is closed (i.e. contains no providers), and you try printing the Appointments report for this date, axiUm displays the message, “The selected book contains no providers. Cannot proceed,” and this is fine. However, if you change the date on the appointment book to an open date (i.e. contains providers), and you try printing again, axiUm displays the same message again.
Solution: Fixed so that in the above scenario, axiUm prints the Appointments report.
133145 - Primary faculty not displaying on appointment block

Module: Scheduler - Active tab, Weekly tab

Problem: If a patient has a primary faculty, and you create an ortho appointment for this patient, axiUm does not display this primary faculty’s name on the booked appointment block.

Solution: Fixed so that the patient’s primary faculty displays in the booked appointment block.

133659 - Clinic time exception color not displaying

Module: Scheduler - Active tab

Problem: The clinic time exception color does not display in the Active tab. For example, if:

- You set up a provider to be available Monday from 8-5pm, with an enforced discipline between 8-10am, plus a clinic time exception from 9-12pm (where the provider is unavailable in all clinics).
- The Scheduler Options window’s Options section has the Show Ideal Day Discipline/Hold Time Colors checkbox selected.

Then when you go to the Active tab and select to display this provider, axiUm shows the color for where only the enforced discipline exists (8-9am) but fails to display the color where the clinic time exception occurs (9-12 pm).

Solution: Fixed so that in the above scenario, axiUm shows the clinic time exception color correctly.

Note: If there is an overlap between the enforced discipline and the clinic time exception, axiUm displays the exception color “on top”.

133743 - REQNOTE.DeleteDate field is not being set

Module: Scheduler

Problem: In the database, “DeleteDate” column is null in the REQNOTE table.

Solution: Fixed so that “DeleteDate” has a date.

134026 - Failing/cancelling confirmed appointments show green text

Module: Scheduler - Active tab

Problem: If a patient confirms an appointment, the text on the appointment block turns blue. Then if you cancel or fail this appointment, the text turns green with a cross-out in black (cancel) or red (fail). Need text to remain blue.
**Solution:** Now in the above scenario, the text remains blue. Note that the cross-outs remain the same.

---

**134154 - Clinic time exception field allows blank**

**Module:** Scheduler ~ Provider Clinic Time Exceptions window

**Problem:** You can leave the Description field blank when you create a provider clinic time exception. This is a required field.

**Solution:** Fixed so that required fields must be entered before saving the new record.

---

**134173 - Booked recall remains unscheduled**

**Module:** Scheduler ~ Appointment Expert window

**Problem:** If you use the Appointment Expert window to schedule a recall, this recall remains unscheduled. In other words, in the Appointment Lists window's Recalls tab, axiUm retains the recall record.

**Solution:** Fixed so that in the above scenario, axiUm removes the recall record from the Appointment List window’s Recalls tab.

---

**134218 - Width of booked appointment block changes**

**Module:** Scheduler ~ Appointment Report

**Problem:** If you have a series of booked appointments in a column, the first appointment at the top shows the correct width, but the width of those appointments below it become progressively narrower towards the bottom of the book.

**Solution:** Fixed to display all appointments in full width.

---

**134377 - Display issue with Appointment Report**

**Module:** Scheduler ~ Appointment Report

**Problem:** If you select a book of chairs with no reservations, and you print the Appointment Report, the report displays cross-hatches down the left side (i.e. provider time) in each appointment block.

**Solution:** Fixed so that in the above scenario, axiUm displays solid colours instead of cross-hatches.

---

**134418, 135515 - Cancelling appointment causes crash**

**Module:** Scheduler - Active tab

**Problem:** This problem (134418) occurs if provider1 on workstation1 creates an appointment for patient1, and then provider2 on workstation2 creates an appointment for patient2 (for the same
day, either same or different book). Then if provider2 immediately cancels patient2’s appointment, and provider1 cancels patient1’s appointment immediately after that (but before axiUm refreshes), axiUm crashes.

Similar problem (135515) occurs with other right-click options in the Active tab.

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

---

**134422 - MCB column shows when no provider selected**

**Module:** Scheduler - Active tab

**Problem:** If you are using the book method of scheduling, and you are also using the MCB column feature, and no provider selected in the book, booking an appointment displays the corresponding MCB in the column.

**Solution:** Fixed so that MCB column displays the appointment block only when a provider is selected.

---

**134456 - Scheduler Report display issue**

**Module:** Scheduler ~ Scheduler Report

**Problem:** The color bar on the left of the appointment does not extend from the start time of the report to the start time of the appointment.

**Solution:** Fixed so that the color bar does not display outside the set time range.

---

**134552 - Appointment details not showing in tooltip**

**Module:** Scheduler - Active tab

**Problem:** If you have more than five display options set up in the Appointment Display Options window, and in either Line 5 or Line 6 the Appt Procedures option is displayed, and you add an appointment (with no treatment attached, but contains the display values), the tooltip (displayed by clicking on the booked appointment block) shows a dotted line where the appointment procedure should display.

**Solution:** Fixed to show the appointment procedure.

---

**135405 - appoint.rpt is missing appointments tied to treatment (2)**

**Module:** Scheduler

**Problem:** This is to fix all custom versions of the report for 132102.

**Solution:** Fixed.
135962 - Session layout is considering instructor time off in the past

**Module:** Scheduler ~ Discipline/Group Layout window

**Problem:** If an instructor time-off record is in the past, creating a session layout displays a warning that the instructor is not working during this time.

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

---

136052 - Appointment Indicators to Display window causes SQL error

**Module:** Scheduler ~ Appointment Indicators to Display window

**Problem:** This problem occurs if you have existing values in ApptIndicator1 and ApptIndicator2 (in Maintenance window - System tab - Station Options icon - Station Options tab - Scheduler section - Schedule section), and then you clear ApptIndicator1. If you try opening the Appointment Indicators to Display window (in Scheduler - Options/Settings - Scheduler Options window - Scheduler Type section - Indicators button), axiUm displays an SQL error.

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

---

136335 - Appointment Lists window not filtering records

**Module:** Scheduler ~ Appointment Lists window

**Problem:** If you open the Appointment Lists window (in Scheduler window - (Lists)), and run a search, axiUm ignores the following search criterion:

- From the Type drop-down field you select the Active option, and from the Signed In drop-down field you select any option.
- From the Type drop-down field you select the Checked In option, and from the Seated drop-down field you select any option.

**Solution:** Fixed so that axiUm considers the search criteria you select from the Signed In drop-down field and the Seated drop-down field.

---

136455 - Appointment display issue

**Module:** Scheduler - Active tab

**Problem:** If you have more than five display options set up in the Appointment Display Options window, and in either Line 5 or Line 6 the Appt Procedures option is displayed, and you add an appointment (with no treatment attached, but contains the display values), the Appointment Report (printed by clicking (Print View)) shows a dotted line where the appointment procedure should display.

**Solution:** Fixed to show the appointment procedure.
136821 - New appointments/planned appointments default to incorrect provider

**Module:** Scheduler ~ New Appointment window, New Planned Appointment window

**Problem:** If there is a PTRECALL record with an Id=0 (either deleted or not) and a non-provider attempts to add an appointment for a patient who has not been assigned a provider, the "New appointment"/"New planned appointment" window opens up defaulted to the provider of that PTRECALL record.

**Solution:** The New Appointment window and the New Planned Appointment window do not default to the provider of that PTRECALL record.

137356 - Length of Reason fields are inconsistent

**Module:** Scheduler ~ New Planned Appointment window, Edit Planned Appointment window

**Problem:** The Reason field in the New Appointment window allows 200 characters, but the same field in the New Planned Appointment window allows only 30 characters.

**Solution:** Increased the size of the Reason field in the New Planned Appointment window and the Edit Planned Appointment window to 200 characters.

137713 - Unnecessary arrow keys in Appointment Request window

**Module:** Scheduler ~ New Appointment Request window

**Problem:** The New Appointment Request window displays unnecessary up/down arrow keys.

**Solution:** Fixed by removing the up/down arrow keys.

137720 - Monthly tab not displaying provider's reservations

**Module:** Scheduler ~ Monthly tab

**Problem:** If you book an appointment using a book with no reservations, axiUm fails to show the provider's reservations on the Monthly tab of the scheduler.

**Solution:** Fixed so that in the above scenario, axiUm displays the provider's reservations in the Monthly tab.

137873 - Searching in Appointment Expert window causes SQL error

**Module:** Scheduler ~ Appointment Expert window

**Problem:** axiUm displays an SQL error when you search for appointments using the following search criteria:

- search on available chairs
- based on appointment book
- the book allows dynamic columns
• use clinic sessions

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

---

Transactions

73933, 129654 - Warning message is unclear, unclear window name

Module: Transactions ~ Payment Plan Warning on Insurance Payment window (changed)

Problem: When you transfer an insurance amount to a patient on a regular (i.e. non-ortho) payment plan, and then allocate a lesser amount to that patient than you transferred to them:

- axiUm displays the Insurance Payment Payment Plan Warning window
  Problem 1 (129654): The title of this window is awkward.

- This window displays the message, “The insurance transfer will affect payment plan balance.”
  Problem 2 (73933): This message lacks the details to sufficiently inform the provider of steps they must take next.

Solution: Fixed. Now in the above scenario:

- Solution 1 (129654): Renamed the window title to Payment Plan Warning on Insurance Payment window.

- Solution 2 (73933): axiUm displays the message, “The insurance transfer will affect payment plan's "Amount Remaining" seen when selecting the “Apply” button (but the patient's balance will not be affected). If you would like the patients A/R to be affected by this transfer, you will have to deal with this manually by adding a patient adjustment. Are you sure you want to continue?”

93100 - Inactive tx records are not using tx status color

Module: Transactions - General Tab

Problem: When a treatment has become inactive based on the treatment status code, the color of the treatment changes in the Planned sub-tab based on the color of the status code. This color does not display in the Pending sub-tab.

Solution: The Pending sub-tab now displays inactive treatments in the color of the corresponding treatment status code.
116631 - Patient Statement not displaying payor's name

Module: Transactions ~ Statement report

Problem: When you print the patient's Statement report (by going to the Transactions window - Treatment tab - Statement button - Statement window), axiUm displays the patient's name on the payment lines. axiUm should display the payor's name.

Solution: Fixed so that the payor's name displays.

---

121528 - Insurance information not retained

Module: Transactions - Treatment tab

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

Solution: Fixed.

---

121982 - Claim submission displays multiple claim window

Module: Transactions ~ claim forms

Problem: This problem occurs when all of the following occurs:

- Tx1: Insurance1 > $0, Insurance2 = $0.
- Tx2: Insurance2 = $0, Insurance2 > $0.

Then when you submit this claim, axiUm displays the claim window for both insurance companies.

Solution: Fixed so that in the above scenario, axiUm displays the claim window for insurance1 only.

---

127063 - Insurance payment allocation issues in multi-user situation

Module: Transactions

Problem: When multiple users on different workstations simultaneously enter insurance payment allocations, axiUm updates the insurance payment amount incorrectly.

For example: Provider1 on workstation1 enters an insurance payment record, and applies $50.00 to a patient record. axiUm displays the message, “The patient has secondary insurance that may cover the procedure. Are you sure you want to write off the balance?” but provider1 delays this confirmation. In the meantime, provider2 on workstation2 applies the same insurance payment record (entered by provider1) to the same patient, but allocates a different amount ($25.00), and when axiUm displays the message they immediately confirm this. When provider1 finally confirms their action, axiUm calculates this paid insurance amount as $50.00, and it should include the $25.00 for a total of $75.00.

Similar problems occur when you delay the confirmation of other messages, for example:
• “The patient has secondary insurance that may cover the procedure. Are you sure you want to transfer the balance?”
• “This insurance transfer will affect payment plan balance. Are you sure you want to continue?”
• “Amount will be transferred to Patient because there is no other Insurance to Transfer the amount to.”

**Solution:** Fixed so that in the above scenario, axiUm calculates the correct amount. In our example, this will be $75.00.

---

### 127221 - Cannot auto-allocate pre-payments

**Module:** Transactions - Payments tab

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

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

---

### 128657 - Incorrect “held for” payment plan amounts

**Module:** Transactions

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

**Solution:** Fixed.

---

### 128755 - Duplicate patient payment records

**Module:** Transactions - General tab

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

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

Then when you view the Transactions window’s General tab, axiUm displays the patient payment record twice. This is a display issue only, and all calculations are correct.
Solution: Fixed so that in the above scenario, axiUm displays the record once.

128872 - Problem with the PTBALEXT Package
Module: Transactions
Problem: When using OPEN ITEM, the PTBAL EXT package is not updating the over-365 buckets.
Solution: Fixed.

129284 - Suppress printing secondary insurance claim if $0 balance
Module: Transactions
Problem: Currently, if the Auto Batch Unsubmitted Claims window (in Maintenance window - System tab - Processes icon - Processes window - Auto Claims button) has the Create claims for Secondary Insurers checkbox selected, secondary claims are created even if the primary insurance paid the claim in full.
Solution: Now when you select this checkbox, and the primary insurance paid the claim in full, axiUm no longer batches the claim to the secondary insurance.

129716 - Submitting EDI claim causes SQL error
Module: Transactions
Problem: If you submit an EDI claim for a treatment, and the insurance company uses an alternate procedure code for that treatment, axiUm displays an SQL error.
Solution: Fixed so that in the above scenario, axiUm no longer displays an SQL error.

129966 - Cannot re-bill multiple treatments
Module: Transactions ~ Applying Ins. Payment window
Problem: In the Applying Ins. Payment window, if you go to the list view and select multiple records and then right-click to display a list of options, the Rebill Treatments option is disabled. It should be enabled.
Solution: Fixed so that in the above scenario, the Rebill Treatments right-click option is enabled.

130377 - SQL function returns incorrect amounts
Module: Transactions
Problem: The PAYPLAN_BAL_PKG.PP_OPEN_BAL function (which retrieves the overall payment plan amount, then applies all payments and adjustments against this payment plan amount, and then returns the total amount) is excluding allocated payments (i.e. Type 73 records), causing the total amount to be incorrect.
Solution: Fixed to include Type 73 records.

130405 - The Tx Status drop-down field is blank

Module: Transactions - Treatment tab

Problem: When you select either an in-process or completed treatment record, and in the Tx Status drop-down field you:

- Clear the existing value:
  When you click the Modify button, axiUm enters the default value in the Tx Status drop-down field, if any exist (in Maintenance window - Basic tab - Status Codes - Status Codes window, the Default checkbox is selected).
  axiUm should enter the default value only when you create a new record, not when you edit an existing record. In this case, the Tx Status drop-down field should remain blank.

- Enter a value that makes this record inactive (in Maintenance window - Basic tab - Status Codes - Status Codes window, the Make Treatment Inactive checkbox is selected):
  When you click the Modify button, axiUm enters the default value in the Tx Status drop-down field, if any exist. If no default values exist, axiUm clears your entry.
  In this case, axiUm should retain the value you selected.

Solution: Fixed so that in the above scenarios:

- The Tx Status drop-down field remains blank.
- The Tx Status drop-down field retains the value you selected.

130752 - Problem closing payment plans

Module: Transactions - Pmt Plan tab

Problem: When you close a payment plan (by clicking the Delete/Close button), axiUm disassociates the allocation history records from their payment plan, causing an imbalanced A/R Reconciliation report.

Solution: Fixed so that in the above scenario the A/R Reconciliation report shows the correct balance.

130932 - Warning appears when it should not

Module: Transactions - Ins Pmt tab

Problem: When you add a duplicate insurance payment record, axiUm displays the Duplicate Insurance Payment Warning window that notifies you of an existing identical record, and this is fine.
However, the term *duplicate* is defined as having the same insurance company, date, code, and total. For example, if you add a similar insurance payment record but for a different bank, axiUm still displays this warning, and in this case axiUm should suppress it.

**Solution:** Now in the above scenario, axiUm no longer displays the Duplicate Insurance Payment window.

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**130976 - Multiple users cause incorrect A/R amount**

**Module:** Transactions - Payments tab

**Problem:** This problem occurs if userA on workstationA created a patient payment record, then userB on workstationB begins reversing that patient payment (but does not click the OK button), and then userA allocates that patient payment. Then later on when userB completes the patient payment reversal (by clicking the OK button), the list view’s Applied column displays an incorrect amount. This causes incorrect A/R amounts.

**Solution:** Fixed so that in the above scenario, when userB clicks the OK button, axiUm displays a message to prevent them from completing this action.

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**131484 - Blank fields in claim forms**

**Module:** Transactions

**Problem:** This problem occurs when you have all of the following setup:

- In Maintenance window - System tab - System Options icon - System Options window - System Options section, the Medical Diagnosis Code Type displays the ICD-10 option.
- In Maintenance window - Insurance tab - Insurance Companies icon - Insurance Companies List window - (Edit Record):
  - The Diag. code type drop-down field displays the ICD-9 option.
  - The **Claim form** drop-down field displays either a HCFA-type claim format or the ADA 2012 claim format.
- In Transactions window - Treatment tab - Medical button - Tx Medical Information window - Medical Info section, all four **Diagnosis Code (for Claim)** fields display a value.

Then when you submit the claim, the diagnosis codes indicated in the first, second, and third field of the Tx Medical Information window is displayed in Box 34a positions B, C, and D (A is blank).

The same problem occurs in the EDI file.
Solution: Fixed so that in the above scenario, all four diagnosis codes are displayed in the claim form.

131855 - Allocating prepayments causes incorrect total

Module: Transactions

Problem: When you allocate a patient pre-payment to a patient charge, the internal history records show the apply-to-payment amount before the unallocate-from-pre-pay amount, temporarily causing a greater payment total than the original amount before decreasing the amount to account for the allocation to the charge.

Note: This has no affect on payment history displays or A/R balances in axiUm. However, the A/R report detail line may appear confusing.

Solution: Fixed to show the decrease (i.e. unallocate-from-pre-pay amount) before the increase (i.e. apply-to-payment).

132139 - Patient payment record is hidden when it should display

Module: Transactions - Payment tab

Problem: This problem occurs if the selected patient has a guarantor (and the patient is not their own guarantor). If you create a payment record where the patient paid, and you deselect the Include Guarantors’ Payments for Other Patients checkbox, axiUm displays this payment record in the list view, and this is fine. However, if you select this checkbox, the payment record is omitted from the list view.

Solution: Fixed so that in the above scenario, the payment record displays in the list view.

132170 - Can change procedure from bridge-type to non-bridge type

Module: Transactions - Treatment tab

Problem: You can change the procedure code from a bridge-type procedure to a non-bridge type procedure.

Solution: Fixed so that you are now prevented from doing this. When you try changing a bridge-type procedure to a non-bridge type procedure, axiUm displays the message, “A bridge type procedure cannot be changed to a non-bridge type procedure. Cannot proceed!”

132377 - Deleting payment plans causing problems

Module: Transactions - General tab

Problem: If you delete a payment plan where the Balance to Charge is the same as the Plan Total, axiUm updates the associated transactions incorrectly. You can see this discrepancy in the Transactions window’s General tab using the Date Ledger view mode (in Transactions window - Options/Settings - Transaction Options window - Display Options section, and in the General Tab view section the Date Ledger options is selected).

Solution: Fixed so that the correct amount is shown.
132536 - Unnecessary message

**Module:** Transactions - Treatment tab

**Problem:** If you select patient1 (inactive), and in the Transactions window’s Treatment tab, try entering a new treatment record, axiUm displays the message, “Treatments cannot be performed on a patient with an Inactive status.” This is fine. However, if you leave the Transactions window open, select patient2 (active), and return to the Transactions window (now displaying patient2), axiUm displays the same message again.

**Solution:** Fixed so that in the above scenario, axiUm does not display the second message.

132708 - Message not displaying second time

**Module:** Transactions - Treatment tab

**Problem:** If you try adding a treatment with a future date, axiUm displays the error, “Cannot have a treatment date in the future!” This is fine. However, if you add a macro code, and enter a future date, axiUm displays no error, and it should.

**Solution:** Fixed so that in the above scenario, axiUm displays the same message the second time.

132815 - Insurance transfers to patient shows incorrectly

**Module:** Transactions ~ Statements report

**Problem:** When a payment plan ID reaches a certain number, any insurance amount that have been rejected and where an insurance adjustment transfer to patient was made, causes it to show incorrectly in the statement.

**Solution:** Fixed to show correctly on the statement.

132847 - Editing claims on 2 workstations hangs axiUm

**Module:** Transactions - Treatment tab

**Problem:** This occurs when two workstations are involved. On workstation1, enter two treatments containing different instructors, then rebill both on the same claim, and then change the instructor on one of those treatments. When axiUm displays the Instructor Change Warning window, “The instructor for this treatment is different from the instructor for the other treatments on this claim,” leave this message open. Then on workstation2, select the same claim and update any field. axiUm hangs.

**Solution:** Fixed so that in the above scenario, workstation2 no longer hangs. Because the user on workstation1 has no responded to the question, the user on workstation2 can still modify the record. Otherwise, workstation2 displays the warning that another user has updated the record.
132905 - Clicking the Payment tab freezes axiUm

**Module:** Transactions - Payment tab

**Problem:** If you select a patient and then click on the Transactions window’s Payment tab, axiUm freezes momentarily.

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

---

132919 - Cancelling print job crashes axiUm

**Module:** Transactions ~ Statements report

**Problem:** Closing the Select Printer window during the print process crashes axiUm.

**Steps to replicate:**

1. Open the Statements window.
   - Go to Transactions window - Treatment tab - Statement button.
2. Click the Print button.
   - axiUm displays the Select Printer window.
3. From the list box, select Microsoft XPS Document Writer.
4. Click the Select button to begin printing and immediately click (close).
   - axiUm crashes.

**Solution:** Fixed so that in the above scenario, axiUm disables the (close) button and you can no longer select it during the print process.

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133293 - NY Medicaid rate code treatment gets deleted

**Module:** Transactions - Treatment tab

**Problem:** In some cases, if you delete a planned treatment record, axiUm deletes the NY Medicaid rate code on a completed treatment record. This problem arises if you have a rate code on a claim containing completed treatments and you delete a planned treatment on a claim with the same TRX#.

**Solution:** Fixed.

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133473 - Merging charts retain Type 73 records

**Module:** Transactions - Payment tab

**Problem:** When a patient-guarantor chart (i.e. the invalid chart) is merged with a patient-dependent chart (i.e. the valid chart), and both records contain an insurance policy, axiUm fails to correctly update all the history records, causing Type 73 records to be retained.

**Solution:** Fixed so that in the above scenario, axiUm deletes Type 73 records.
133481 - Problem applying patient payment

Module: Transactions ~ Applying Payment window

Problem: If the Applying Payment window displays a patient payment that is partially allocated to a prepayment and partially allocated to a treatment, and then you deselected the patient from the Applying Payments window’s Patients (payment is for) section, axiUm does the following:

- Removes the patient's treatment. This prevents payment allocation to this treatment.
- The remaining amount to apply does not reset. This prevents you from allocating the full remaining amount.
- If you make additional allocations before closing the Applying Payment window, the payment record shows incorrect amounts in the Amount column and the Applied column. This prevents you from making the full payment allocation, causing A/R imbalances in the reconciliation report.

Solution: Fixed so that if you deselect the patient from the Applying Payments window’s Patients (payment is for) section, axiUm no longer causes these issues.

133608 - Default bank fields become blank

Module: Transactions - Ins Pmt tab

Problem: If you click the New button, the Bank field displays the default value (as defined in your user record), and this is fine. However, if you go to the Code field and enter a payment code (that has no associated default bank), axiUm clears the Bank field rather than retain it.

Solution: Fixed so that in the above scenario, axiUm displays the default bank code.

The same fix was made to the Adjustment tab.

Note: There are three areas in axiUm where you can define the default Bank field. Each item in the following list takes precedence over the one below it:

1. In the Maintenance window - Transactions tab - Payment Codes icon - Payment Codes window, the Bank Default field displays an option.
2. In the Transactions window - (Options/Settings) - Transaction Options window - Miscellaneous section, the Default Bank field displays an option.
3. In the Maintenance window - Office tab - Users icon - Users List window - run a search - (Edit Record) - Additional tab, the Default Bank field displays an option.

133609 - Speed issue

Module: Transactions - Payments tab

Problem: Selecting any right-click option on a payment record takes a long time to initiate.

Solution: Fixed by improving the speed of right-click options.
133647 - Claim history query freezes

**Module:** Transactions - General tab, Treatment tab

**Problem:** Selecting the Claim Submission History right-click option freezes axiUm.

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

133828 - Problems rebilling dual insurance claims

**Module:** Transactions

**Problem:** axiUm’s method of rebilling dual insurance claims is inconsistent with rebilling single insurance claims. In some cases, this causes axiUm to batch the primary insurance when it should not (e.g. the treatment was rebilled), and now you cannot re-batch the secondary claim (because it was submitted before the treatment was rebilled).

**Solution:** Fixed so that if primary insurance pays the full amount, the auto-batch claims process re-batches the secondary insurance claims.

133877 - Changing treatment to Completed status takes a long time

**Module:** Transactions - Treatment tab

**Problem:** If you create an in-process treatment record in the EHR module, and you go to the Transactions window’s Treatment tab and change the status of this record to Completed, axiUm takes a long time to process.

**Solution:** Fixed to improved processing time.

133883 - Duplicate claim submission records

**Module:** Transactions ~ Claim Submission History window

**Problem:** When you submit a claim to the primary insurance and also the secondary insurance, and then rebill the treatment, the Claim Submission History window displays four records.

**Solution:** Fixed to show only two records.

134000 - Treatment tab takes a long time to load

**Module:** Transactions - Treatment tab

**Problem:** In the Treatment tab, the Treatment sub-tab and the Planned sub-tab takes a long time to load.

**Solution:** Fixed by improving the loading speed.
134074 - Pre-authorization information goes missing

Module: Transactions ~ Tx PreAuthorization window

Problem: If insurance has expired, the Tx PreAuthorization window (accessed by going to Transactions window - Treatment tab - PreAuthorization # right-click option) no longer shows any pre-authorization information.

Solution: Fixed so that in the above scenario, axiUm shows the pre-authorization information.

134586 - Problems with PAYPLAN_BAL_PKG.PP_OPEN_BAL

Module: Transactions - Pmt Plan tab

Problem: PAYPLAN_BAL_PKG.PP_OPEN_BAL is incorrectly including insurance adjustments, causing miscalculations for non-Ortho payment plans.

Solution: Fixed.

134603 - Problems switching users

Module: Transactions - Treatment tab

Problem: If user1 begins entering fields (e.g. the Code field), and then switches sessions with user2 (by going to Tools menu - Switch User option - Switch User window), axiUm displays the Switch User window first (for user2). Then after user2 successfully logs on, axiUm displays a message (for user1), “Changes will be lost. Are you sure you want to continue?”

- axiUm displays these two windows in reverse order.

- If you click the Yes button, axiUm displays the same message again.

Similar problem occurs if you:
- Go to Tools menu - Log Off option - message box - Yes button.
- Click (close) to close axiUm.

- If you click the No button, the Switch User window should appear, but axiUm displays nothing. This may appear that user2 is logged on, but the session is still logged under user1.

Solution: Fixed so that in the above scenarios:
- axiUm displays the message first then displays the Switch User window next.
- If you click the Yes button, axiUm displays the message only once.
- If you click the No button, axiUm displays the Switch User window.
134760 - Unnecessary window

Module: Transactions - Adjustment tab

Problem: If you change a field (one that does not affect the balance, e.g. Description field) of a fully allocated adjustment record, axiUm sometimes displays warnings related to level-based adjustment amount rules. Because you are not changing the amount, these warnings are unnecessary.

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

134800 - Bad data causing payment plan allocation problem

Module: Transactions - Pmt Plan tab

Problem: If you used version 5.0 to create pre-payments for payment plans, these pre-payment records had no PayPlanID and axiUm could not link the two together, creating bad type 2 records. Then if you upgraded to 5.10 (or higher) and unallocated one of these pre-payments (created in 5.0), axiUm converted these records incorrectly, creating two incorrect type 73 records.

Solution: Now pre-payment records have a PayplanID. Update scripts will clean the existing bad data:

- For versions before 5.10, the script will clean the bad type 2 records.
- For version 5.10 and later, the script will fix the two incorrect type 73 records.

135115 - Tx Medical Information window workflow issue

Module: Transactions ~ Tx Medical Information window

Problem: When you create a treatment record with no tooth site (but requires one), axiUm displays an error message, and this is fine. However, closing this message displays the Tx Medical Information window instead of returning to the previous screen for you to enter the required fields.

Solution: Fixed so that in the above scenario, axiUm returns to the previous screen.

135370 - Diagnosis codes not correctly displaying on claim forms

Module: Transactions ~ claim forms

Problem: In some cases (e.g. your institution uses ICD-10 codes and conflicting diagnosis codes appear across multiple ADA2012 claim forms), if the patient has no insurance, axiUm does not correctly display diagnosis codes on these claim forms.

Solution: Fixed so that in the above scenario, axiUm displays a warning message.

135546 - Rebilling claim fails to show as unbatched

Module: Transactions - Treatment tab
**Problem:** If you select a patient with two insurance policies and a submitted claim, rebilling this claim to more than one insurance policy causes the treatment record to remain in black text (indicating they are submitted).

**Solution:** Fixed so that in the above scenario, axiUm displays the treatment record in green text (indicating they are unsubmitted).

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### 136209 - Error printing estimates from preview using CRPE engine

**Module:** Transactions ~ Estimate report

**Problem:** This problem occurs if your station options are set to CRPE engine. Then if you select a planned treatment and try printing the estimate for the patient to sign, axiUm displays the message, "The following report could not be found, or access was denied".

**Solution:** Fixed so that the estimate prints without any error messages.

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### 136332 - Adjustment code rules are applied to payment allocations

**Module:** Transactions

**Problem:** If an adjustment code and payment code uses the same code, and you have no access to the adjustment code, attempting to unallocate a payment with the same code displays the message, "You do not have access to this Adjustment Code."

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

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### 136535 - The Guarantor drop-down field is disabled

**Module:** Transactions - Pmt Plan tab

**Problem:** After creating a payment plan, axiUm disables the Guarantor drop-down field.

**Solution:** Fixed. As long as the patient has a primary guarantor, axiUm leaves the Guarantor drop-down field enabled.

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### 136636 - Payment Plan Payment History pulling wrong records

**Module:** Transactions ~ Payment Plan Payments window

**Problem:** When you allocate a payment in full, but part of it is assigned indirectly to the payment plan, axiUm pulls Type 3 records, which shows that everything has been allocated to the payment plan when it wasn't. Also, when you allocate money from a payment that was not originally for a payment plan, axiUm omits this from the payment history window.

**Solution:** Fixed so that in the above scenario, axiUm pulls Type 73 records. This shows the correct amount allocated to the payment plan.
136709 - Right-click options accessible with no record selected
Module: Transactions - Treatment tab
Problem: In the Planned sub-tab, the following right-click options are enabled, even if there is no record highlighted in the list view:
  - Show History
  - EOB Details
  - Additional Tx Info

Solution: Fixed so that in the above scenario, these right-click options are disabled.

136994 - Guarantor’s payment record does not display if no longer a guarantor
Module: Transactions - Payments tab
Problem: If the guarantor who made the payment is no longer a guarantor on the patient's account, axiUm does not display this payment on the Guarantor’s Payments tab. It was only visible on the Patient Payments tab.
Solution: Fixed so that in the above scenario, axiUm displays the guarantor’s payment record.

137689 - Users with no access to adjustment code can unallocate it
Module: Transactions - Treatment tab
Problem: If you have no access to an adjustment code, you can still unallocate it from the Allocations window (by going to Transactions window - Treatment tab - Treatments tab - Show Allocations right-click option, and clicking the Unallocate button).
Solution: Fixed so that in the above scenario, you cannot unallocate the adjustment.

138076 - ADA2012 form causes rejected claims
Module: Transactions
Problem: Some images attached to claims use a low resolution, causing claim rejections.
Solution: Increased to a higher resolution to improve image quality.
axiUm Release 5.20.01

EHR

139210 - Problems changing procedure containing no default phase/discipline
Module: EHR ~ Treatment Plan window
Problem: When you change a procedure from one that contains a default discipline/phase to one that contains no discipline/phase, axiUm retains the defaults from the first procedure instead of clearing these fields.
Solution: Fixed so that in the above scenario, axiUm clears the phase/discipline when you select the second procedure.

139274 - Pressing Tab key moves cursor into disabled field
Module: EHR ~ Treatment Plan window
Problem: When you go to the Tx Option 1 tab, click on New Item to display the popup window, and press the Tab key to move the cursor through the fields, axiUm moves the cursor into the disabled Sts. field (the unnamed field located between the Sequence field and the Estimate field).
Solution: Fixed so that axiUm moves the cursor into the next enabled field (i.e. Discipline drop-down field).

139730 - Expert list not filtered by diagnosis
Module: EHR ~ Treatment Plan window
Problem: In Treatment Planning, when a Diagnosis was selected in Treatment Input, the Intellisense procedure code list was not filtering based on the user’s Quick List setup. The procedure code list that pops up should filter based on the selected Diagnosis and selection on the odontogram.
Solution: When a Diagnosis is selected and a selection is made on the odontogram, the resulting procedure code list is now loaded based on the user’s Quick List in conjunction with the Diagnosis and odontogram selection.

General
138654 - Topaz setup without the device causes axiUm to freeze

Module: Signature

Problem: This problem occurs if you have no Topaz signature capture device install but have set up axiUm to use this (the Desktop Settings window - Other settings Section - Signature Capture Device drop-down field displays the Topaz 1x5 option or the Topaz LCD 4x5 option). Then when you preview a form that requires a patient signature (e.g. from the Transactions module you preview a treatment estimate), and you close this preview, axiUm freezes.

Solution: Fixed so that in the above scenario, closing the preview displays a message indicating that axiUm could not find a Topaz signature pad connected.

Info Manager

125139 - Cannot run Crystal Reports with Package Datasource

Module: Info Manager

Problem: axiUm is unable to run custom Crystal Reports containing stored procedures.

Solution: This functionality is now available if you are using.NET Engine (set up in Station Options window - General section - Report section - Engine item).

139072 - Patient History report causes SQL error

Module: Info Manager

Problem: When you edit the Patient History report (by going to the Report Definition window - Patient History file - Fields list box, and adding the Patient History.Pt. Preferred field to the Selected list box), running this report displays an SQL error.

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

Maintenance

138904 - Incorrect message

Module: Maintenance ~ Export Clinical Quality Measures window

Problem: If you set the Year field to blank and export the CQM, axiUm displays a message based on your setup (e.g. "1 out of 1 Clinical Quality Measures Exported successfully"). This message is incorrect.

Solution: Fixed to display the message, "Field cannot be blank".
138959 - Merging charts deletes patient messages
Module: Maintenance ~ Chart Merge Utility window
Problem: If you send a message to patient A, and you merge charts from patient A to patient B, the message you sent to patient A is not in patient B's folder.
The same problem occurs with messages received from patient A.
Solution: Fixed so that in the above scenario, axiUm retains all messages sent to and received from patient A.

138987 - Clearing field causes SQL error
Module: Maintenance - Users window
Problem: When you go to the Users window - provider tab - Scheduler section and you clear the Schedule until field, and you click the Save button, axiUm asks if you want to update this for all providers. Then if you click the Yes button, axiUm displays an SQL error.
Solution: Fixed so that in the above scenario, axiUm no longer displays the SQL error.

Messenger

139769 - Taking long time to load
Module: Messenger
Problem: This module takes a long time to load.
Solution: Fixed to improve loading time.

139850 - Problems sending messages to a distribution group
Module: Messenger
Problem: Sending messages to a distribution group leaves no sent item in your sent box
Solution: Fixed.

PowerAdmin

138492 - Mismatched security
Module: PowerAdmin
Problem: Importing security levels in PowerAdmin causes a mismatch between its control settings and the associated axiUm windows. In other words, PowerAdmin control settings may show yellow but the associated axiUm window displays green.

Solution: Fixed so that in the above scenario, the axiUm windows reflect PowerAdmin security.

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**Rolodex**

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**139243 - Patient Approvals window closes after swipe if items remain**

Module: Rolodex ~ Patient Approvals window

Problem: In version 5.20.00 (enhancement 78985), axiUm now continues displaying the Patient Approvals window if there are other items remaining to be approved. This works fine if you manually enter your approval credentials. However, this is not working with swipe cards.

Solution: Fixed so that this enhancement with swipe cards.

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**Scheduler**

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**138293 - Unreserving a chair unreserves all partial reserves on it**

Module: Scheduler - Chair tab

Problem: Left-clicking a chair will reserve/unreserve the chair for you, and this is fine. However, if there are two partial reserves on the chair, left-clicking to unreserve causes axiUm to unreserved both partial reserves.

Solution: Fixed so that in the above scenario, axiUm displays a list of the partial reserves for you to select to unreserve.

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**138702 - Problems reserving same provider on two chairs**

Module: Scheduler - Chair tab

Problem: This problem occurs when you create partial reserves on multiple chairs in the same session. If one of the reserves is for a secondary provider, you cannot reserve the same provider on the other chair (even if the reserves do not overlap).

Solution: Fixed to allow this scenario.

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**138985 - Cannot edit partial clinic times if previous appointment existed**

Module: Scheduler - Chair tab
Problem: This problem occurs if you are using chair method of scheduling. If an appointment was deleted in a partial chair reserve, you cannot shorten this reserve time.

For example, if you add a partial reserve (e.g. 1:00pm - 3:00pm) on a chair and schedule two appointments within this time range (e.g. 1:00pm - 2:00pm, 2:00pm - 3:00pm), and you cancel one of these appointments (e.g. 2:00 - 3:00pm), and then edit the partial clinic time that still allows for the remaining appointment (e.g. 1:00pm - 2:00pm), axiUm displays the message, "This provider has appointments(s) in another reserve that conflicts with this entry. Please move the appointment(s) within the new time range before proceeding."

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

Transactions

138907 - STMTJOB.OpenBal Incorrect when payment plan set to start in the future

Module: Transactions ~ statements

Problem: On Statements for patients that have a payment plan starting in the future for old treatment charges (dated prior to statement date), the opening balance incorrectly includes the amounts for these treatments.

Solution: Fixed.

139043 - Payment tab takes a long time to load

Module: Transactions - Payment tab

Problem: When you click the Payment tab, axiUm takes a long time to load.

Solution: Improved loading time of the Payment tab.
axiUm Release 5.20.02

axiUm Kiosk Application

136719 - Location of instruction causes confusion

**Module:** Kiosk

**Problem:** The text "Press the ESC key to quit" is located at the top of the screen immediately below a check-in instruction, making the phrase appear like it is part of the check-in process.

**Solution:** Fixed by moving this phrase to the location at the bottom right corner of the screen.

EHR

135283 - Cannot select quadrants & sextants when adding treatment

**Module:** EHR ~ Treatment Plan window

**Problem:** If you go to the Chart Add tab and add a procedure that requires the selection of a quadrant or sextant, axiUm displays the Quadrant Selection window or the Sextant Selection window, and this is fine. However, if you add the same procedure from the Treatment Plan window, axiUm does not display these windows.

**Solution:** Fixed so that in the above scenario, axiUm displays the Quadrant Selection window or the Sextant Selection window.

138463 - Incorrect behavior or pontic procedures

**Module:** EHR ~ Tx History tab

**Problem:** If you double-click on an in-progress pontic treatment record while the tooth is still present, axiUm displays the message, "Cannot change status of existing tooth for pontic procedure." Because you cannot edit the details (e.g. change the provider) of this treatment, you cannot continue or complete this treatment.

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

138564 - Two changes for Treatment Plan report

**Module:** EHR ~ Treatment Plan window

**Problem:** When you print the Treatment Plan report:

- All problems listed in the report start with the text "Description:"
• The treatment plan description is missing.

Solution: Fixed both problems.

138655 - Chief concerns are only partially displayed in printout
Module: EHR ~ Treatment Plan window
Problem: The Chief Concerns field accepts 255 characters, but when you print the treatment plan only 107 characters display on the printout.
Solution: Fixed to print the entire entry shown in the Chief Concerns field.

138698 - Highlighting multiple records should be disallowed
Module: EHR ~ Treatment Plan window
Problem: You can highlight records in each of the following list views at the same time:
  • Problems list view
  • Diagnoses list view
  • Treatment option list view

This makes it difficult to identify which list view has focus.

Solution: Fixed so that you can highlight multiple records in the same list view only.

138743 - No "Changes will be lost" warning in Chart Add
Module: EHR ~ Chart Add tab
Problem: If you makes changes (e.g. select an existing treatment record and edit a field) and then immediately close the EHR module without saving, axiUm fails to warn you that changes will be lost.
Solution: Fixed to display this message in the following areas of axiUm:
  • Chart Add tab
  • Treatment Macro Processing window
  • In Process Treatment Review window
  • Complete Treatment Review window

138785 - Discipline error occurs when edit approved treatment
Module: EHR ~ Treatment Plan window
**Problem:** When you approve a treatment plan option that contains no discipline, and then you view this option, clicking (OK) to close the popup window displays the message, “Discipline has not been entered. Do you want to enter this now?” axiUm should not display this message because the treatment plan option has already been approved.

**Solution:** Fixed so that in the above scenario, axiUm suppresses the warning message.

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**138806 - Tx Plan description should be saved as soon as it is entered**

**Module:** EHR ~ Treatment Plan window

**Problem:** When you create a new treatment plan, axiUm fails to save the description immediately, causing some windows to show a blank description.

**Solution:** Fixed so that in the above scenario, the treatment plan description displays immediately throughout the Treatment Planning module.

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**138812 - Should be able to delete only that tx plan option in focus**

**Module:** EHR ~ Treatment Plan window

**Problem:** If you select a treatment plan option that is currently not in focus and you select the Delete Option right-click option, axiUm deletes this tab (the one that is not in focus).

**Solution:** Fixed so that when a tab is not in focus, only the New Option right-click option is enabled. All other options (i.e. Delete Option, Reopen Option, and Copy Option) are disabled.

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**138836 - Only the tab in focus should have the option to delete it**

**Module:** EHR ~ Problem History window

**Problem:** This problem occurs when a treatment option contains a procedure that requires multiple approvals (an instructor plus at least one consultant). Once the treatment is approved, the Treatment History window displays multiple unapproved records (one for each approval required).

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

---

**138880 - Switching patients should not refresh Treatment Planning window**

**Module:** EHR ~ Treatment Plan window

**Problem:** If the Treatment Plan window shows patient A, and you go to the Rolodex window and switch from patient A to patient B, the Treatment Plan window closes and re-opens, and axiUm loads patient B even though that window is not in focus.

**Solution:** Now in the above scenario, patient B’s information is loaded only when the EHR module is back in focus.
138887 - Problems cannot be added after manual correction
Module: EHR ~ Update Problems window
Problem: If you go to the Problem field and manually enter a problem, but axiUm finds no matching problems (e.g. you entered a typo or the exact name does not exist), adding this item displays the message, "Invalid Problem" and this is fine. However, if you correct the entry (to one that does exist in the database), adding this problem still displays the message, “Invalid Problem”.
Solution: Fixed so that in the above scenario, axiUm no longer displays the second message and adds the problem to the list view.

138976 - Additional Info right-click option is disabled
Module: EHR ~ Treatment Plan window
Problem: If you select multiple treatment records when viewing a treatment plan option, the Additional Info right-click option is disabled, and this is fine. Then if you select only one of those highlighted treatments, the Additional Info right-click option remains disabled.
Solution: Fixed so that in the above scenario, the Additional Info right-click option is enabled.

139134 - Button is enabled with no record selected
Module: EHR ~ Contract History window
Problem: If you select no record from the list view, axiUm still enables the View button.
Solution: Fixed so that when no record is selected, the View button is deselected.

139170 - List popup does not close when record is deselected
Module: EHR ~ Treatment Plan window
Problem: If a list popup is displayed for a diagnosis record or a treatment option record, and you deselect that record, axiUm continues displaying the list popup.
Solution: Fixed so that when you deselect a record, axiUm closes the list popup.

139339 - Auto spell check not working for some Template Notes
Module: EHR - Notes tab
Problem: In some cases, the spell check does not save the spelling change in long text answers in template notes.
Solution: Fixed so that axiUm saves changes made from spell check.
139718 - Cannot retain selected diagnosis when editing tx records

**Module:** EHR ~ Edit Planned Treatment window, Edit In Process Treatment window, Edit Completed Treatment window

**Problem:** If you select a diagnosis by clicking (ellipsis) and selecting from the Select Clinical Diagnosis window, axiUm does not save your selection.

**Solution:** Fixed so that in the above scenario, axiUm retains your selection.

---

139743 - Surface field allows entry of numeric values

**Module:** EHR ~ Update Problems window

**Problem:** In the Update Problems window, you can enter numeric values in the Surface field.

**Solution:** Now axiUm allows only text values in this Surface field.

---

139797 - Select Procedure window cuts off description

**Module:** EHR ~ Select Procedure window

**Problem:** The Select Procedure window cuts off the description column and you cannot resize the window to reveal all the text.

**Solution:** Fixed by increasing the width of the Select Procedure window.

---

139891 - Problems with Log On As User & Entry on Behalf of Provider

**Module:** EHR ~ Treatment Plan window

**Problem:** If provider2 adds notes in the Treatment Plan window as provider1 by using one of the following features:

- Log On As User
- Entry on Behalf of Provider

axiUm displays provider2 as the note entry user.

**Solution:** Fixed so that in the above scenarios, axiUm shows provider1.

---

139935 - Diagnosis is not added if user click somewhere in list

**Module:** EHR ~ Treatment Plan window

**Problem:** If you enter a diagnosis (by clicking (ellipsis) and selecting from the Select Clinical Diagnosis window) and then you click anywhere in the Diagnoses list view (instead of clicking (OK) or pressing the Enter key), axiUm does not save the diagnosis.
Solution: Fixed so that in the above scenario, axiUm saves the diagnosis.

140007 - Treatment Plan report shows duplicate treatment records
Module: EHR ~ Treatment Plan report
Problem: If both an instructor and a consultant approve a treatment plan, printing the Treatment Plan report displays duplicate treatment records.
Solution: Fixed to display only one record per treatment.

140115 - Patient Recall window highlights first record by default
Module: EHR ~ Patient Recall window
Problem: When axiUm displays the Patient Recall window during automatic recalls, the first recall record in the list view is highlighted by default.
Solution: Fixed so that in the above scenario, no record is highlighted.

140144 - Unable to add a crown on an implant
Module: EHR ~ Treatment Plan window
Problem: If there is a missing tooth and you plan an implant and then try to plan a crown on that implant, axiUm displays a message indicating that the tooth is missing.
Solution: Fixed so you can add a planned crown/pontic/implant on a missing tooth or a tooth with an implant.

140192 - Treatment History window displays incorrect custom field labels
Module: EHR ~ Treatment History window
Problem: In the Treatment History window, axiUm incorrectly displays the custom field labels you defined in the Custom Field window’s Treatment/Note1 field and the Treatment/Note 2 field, but correctly displays the custom field values defined in the Custom Field window’s Treatment (Clinical1) field and the Treatment (Clinical2) field. In short, the values are correct but the labels are not.
Solution: Fixed to display the correct custom field labels defined in the Custom Fields window’s Treatment (Clinical1) field and the Treatment (Clinical2) field.

140263 - Removing treatment plan causes crash
Module: EHR ~ Update Problems window
Problem: When you select the Remove from Tx Plan right-click option, axiUm crashes.
5. 20 Bug Fixes

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

---

## General

### 138848 - Status bar does not refresh

**Module:** Status Bar  
**Problem:** axiUm fails to refresh the status bar indicator when you:

- Switch users  
- Log on as a different user  
- Log off as one user and log on as a different user

**Solution:** Fixed so that axiUm refreshes at the time specified.

---

### 140036 - Error printing reports with .NET engine

**Module:** Reports  
**Problem:** This problem occurs if you are using .NET engine and in the Desktop Settings window, the *Always Select Printer for Printing* checkbox is deselected. Then when you go to the Patient Card window and click ![Print Patient Info](Print Patient Info), axiUm displays the message, “An error occured while processing the report.”

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

---

## Info Manager

### 138736 - Unnecessary fields

**Module:** Info Manager  
**Problem:** Need to remove fields that are hidden from the interface but can be accessed through the database (e.g. Tx Plan Treat Macro Seq).

**Solution:** Fixed.

---

### 139786 - Treatment Plan Txs report contains incorrect custom fields

**Module:** Info Manager ~ Treatment Plan Txs report  
**Problem:** If you go to Info Manager window - Clinical tab - Treatment Plan Txs report, and then you go to Edit Report window - Tx Plan Treatments file, the Fields list box displays the custom
fields’ labels (e.g. Treatment (Clinical1)). It should display their descriptions (e.g. Redo), as defined in the Custom Fields window.

Solution: Fixed.

---

### Maintenance

**137246 - Auto-applying of payments to oldest charge**

**Module:** Maintenance

**Problem:** Currently the overnight package applies any unapplied payments to only the payor’s treatments even if there are other patients who have treatments that the payor is responsible for. Now that we have the ability, in Patient Payments, to apply payments to various family members with one payment, we should be able to do this in the overnight package as well.

**Solution:** An optional parameter was added to the Overnight package. When on, it will allocate patient payments to the oldest outstanding charge for any patient that the payor is responsible for. This will occur in date order (oldest date first) and will occur whether the treatment is payment plan related or not. If the parameter is off, the overnight package will work the way it does currently. This will prevent an unapplied payment from sitting on an account when there are treatments it could/should be applied to.

---

**138291 - Typo in Diagnosis Procedures window**

**Module:** Maintenance ~ Diagnosis Procedures window

**Problem:** The Procedures not applicable for the Diagnosis (searched for) list box is misspelled.

**Solution:** Fixed to show Procedures not applicable for the Diagnosis (searched for).

---

**138439 - PATIENT_PKG.ChartMerge uses incorrect audit type**

**Module:** Maintenance ~ Export Clinical Quality Measures window

**Problem:** In the PATIENT_PKG.ChartMerge procedure, the audit type used for deleting bad patients is 2 (Edit).

**Solution:** Fixed to use 4 (Delete).

---

**139388 - Secondary claims are auto-batched with no payment from primary**

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

**Problem:** This problem occurs when all of the following occurs:

- There is a mix of treatments where some are billed to insurance and some are paid by patient 100%.
- Auto Batch Unsubmitted Claims window: the **Create claims for Secondary Insurers** checkbox is selected.

Then when you run the auto-batch process, axiUm batches claims for insurance 2 although no payment has been received from insurance 1.

**Solution:** Fixed so that in the above scenario, axiUm’s auto-batch of secondary claims will exclude these claims.

---

### 140113 - Inaccessible procedures in quick lists are invisible

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

**Problem:** If the procedure you are adding to a quick list is inaccessible to the user or user level selected, it appears as if axiUm did not add it to the quick list. This is because inaccessible procedures are hidden from view (but has actually been added), and re-adding the same procedure displays the message, “This procedure already exists in this category.”

**Solution:** Now in the above scenario, you can see the procedure code added to the quick list.

---

### 140193 - Procedures button unnecessary for Canadian insurance

**Module:** Maintenance ~ Insurance Company Advanced Options window

**Problem:** This applies to Canadian practices. In the Insurance Company Advanced Options window, need to remove the Procedures button, as this applied only to US practices.

**Solution:** Removed the Procedures button if the practice is Canadian.

---

### Messenger

### 139794 - Unnecessary refresh causes long loading time

**Module:** Messenger

**Problem:** axiUm refreshes unnecessarily when you view and then close a message; or you reply, reply to all, or forward a message.

**Solution:** Fixed by removing unnecessary refreshes.

---

### 139912 - Messages from expired users are missing from Inbox

**Module:** Messenger

**Problem:** The message count on the Inbox includes messages received from expired users but when you open the Inbox, these messages are missing.
Solution: Fixed so that these messages remain in the Inbox.

139943 - Messages from deleted/expired users are excluded

Module: Messenger

Problem: If a message has been sent to you from a user whose user account has now expired or has now been deleted, their messages are deleted from your Inbox. Similarly, if you sent a message to this user, axiUm deletes this message from your Sent folder.

Solution: Fixed so that in the above scenario, axiUm retains these messages.

Patient Attachment

136966 & 136972 - Disabled fields in Add Patient Consent window

Module: Patient Attachment ~ Add Patient Consent window

Problem: The Add Patient Consent window’s Description field and Attachment field are disabled in the following situation:

- 136966: In the Consent Codes window, a scanned-in consent form is defined with the Section drop-down field and Sub-tab drop-down field showing no options.
- 136972: In the Consent Codes window, there is only one active scanned-in consent form defined.

Solution: Fixed so that in the above scenarios, the Description field and the Attachment field are enabled.

Patient Card

139880 - Language field is unnecessary

Module: Patient Info window - Personal tab

Problem: Need to remove the Language field from the Patient Info window - Personal tab - Information section. You can set up Language options using custom fields instead.

Solution: Removed the language field from the following areas of axiUm:

- Patient Info window - Personal tab - Information section.
- Patient Options window - Rolodex section - optional display columns and optional display fields
Info Manager module - Patients tab - Patient List report

Scheduler

139751 - Ortho records should show ortho stage
Module: Scheduler ~ Operatory Monitor window
Problem: When viewing ortho records in a list view, axiUm shows the appointment code. It should display the stage code.
Solution: Now in the above scenario, axiUm displays the stage code. This applies to the following windows:
- Family Appointments window - Appt Code column
- Patient Appointments window - Appt Code column
- Operatory Monitor window (text mode) - Code column

Transactions

105309 - Applying adjustments to pre-payments causes problems
Module: Transactions ~ Applying Adjustment window
Problem: The Applying Adjustment window lets you apply adjustments to pre-payments. This causes AR problems because only the pre-payment amount can be applied, not the adjustment amount. This results in the pre-payment being fully allocated, but the pre-payment amount remains because an adjustment remains allocated to it.
Solution: Now axiUm no longer displays pre-payment records in the Applying Adjustment window.

138256 - Applying adjustments to pre-payment office charges causes problems
Module: Transactions ~ Applying Adjustment window
Problem: If you apply an adjustment to a pre-payment office charge, and you run the auto-apply process, axiUm treats the adjustment as a payment. This can cause incorrect bucket amounts.
Solution: axiUm no longer applies adjustments to pre-payments. The Applying Adjustment window no longer shows pre-payment records.
138933 - Incorrect payment plan amount

Module: Transactions - Pmt Plan tab

Problem: If the Transaction Option window’s Display Options section has the Open Item option selected, and you applied an adjustment to a payment plan, axiUm shows the incorrect payment plan total in the Pmt Plan tab.

Solution: Fixed.

139763 - Sort order of items within a claim

Module: Transactions ~ ADA claim forms

Problem: When you print ADA claim forms, the order of treatments displayed in the printout do not follow the order of records displayed in the Treatment tab.

Solution: Fixed so that treatments are printed in the same order as displayed on the Treatment tab.

Note: For Dentical and Delta CA claims, the sort order is by:

1. procedures without site
2. procedures sorted by site (numeric or alphabetic)
3. treatment number
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EDI Claims

140061 - Unremitted claims submitted via EDI & dropped to paper are not displayed
Module: EDI Claims - Submitted Procedures tab
Problem: With Show unremitted only checkbox checked, axiUm does not show unremitted claims that have been submitted to EDI and then subsequently dropped to paper.
Solution: Fixed so that in the above scenario, axiUm displays all unremitted claims.

EHR

137133 - Closing preview closes the Treatment Plan window
Module: EHR ~ Treatment Plan Contract report
Problem: When you open the Treatment Plan window, then click the Print button, and then select the Preview Draft option, axiUm displays the Treatment Plan Contract report, and this is fine. However, when you close this preview, axiUm also closes the Treatment Plan window.
Solution: Fixed so that in the above scenario, the Treatment Plan window continues to display.

138925 - Single quotes in predefined column heading causes error
Module: EHR ~ Form Pre-defined Columns window
Problem: If you go to the Column Heading Text field and enter a single quote (’), axiUm displays an Oracle error.
Solution: Fixed so that in the above scenario, axiUm no longer displays an error.

138961 - Buttons in eRx Notifications window don’t work until an eRx connection has been established
Module: EHR ~ eRx Notifications window
Problem: If you go to the eRx Notifications window (from the status bar) before establishing an eRx connection during the axium session (by accessing eRx via EHR), and you click on the Messages button or the Reports button, axiUm does nothing.
**Solution:** Fixed so that in the above scenario, clicking the Messages button displays the Messages window and clicking the Reports button displays the Prescription Report window.

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### 139344 - Problems with multi-users adding the same treatment

**Module:** EHR - Chart Add tab  
**Problem:** If two providers (who don’t require approval) add the same treatment on the same patient at the same time, axiUm creates duplicate history records (with one missing the associated treatment record).  
**Solution:** Fixed so that in the above scenario, axiUm notifies you on one of the workstations that duplicate records are found and will abort the action.

---

### 139360 - Display issue in the Select Procedure window

**Module:** EHR ~ Select Procedure window  
**Problem:** This occurs if you have a Canadian practice. Because Canadian practices use only dental codes, it is unnecessary to show the Medical Tx option in the Select Procedure window.  
**Solution:** Fixed so that in the above scenario, the Medical Tx option is hidden.

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### 139553 - Quote Text window’s OK button is enabled after approval

**Module:** EHR ~ Treatment Plan window  
**Problem:** The OK button is enabled when the Quote Text window is displayed and the plan is approved. This is only applicable when using the Patient Estimates optional module.  
**Solution:** Fixed by disabling the button.

---

### 139752 - Need multiple problems added if multiple sites selected

**Module:** EHR ~ Treatment Plan window  
**Problem:** In the Problems tab, axiUm adds the problem for only the last site you selected.  
**Solution:** Fixed so that axiUm creates a separate problem record for each site you selected.

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### 139846 - Selecting an option causes axiUm to hang

**Module:** Maintenance ~ Print Held Claims window  
**Problem:** When you go to the Claim types drop-down field and select the Claims option, axiUm takes a long time to load and appears to hang.  
**Solution:** Fixed so that in the above scenario, axiUm loads the list faster.
139913 - Missing discipline causes multiple warnings

**Module:** EHR ~ Treatment Plan window

**Problem:** When you add multiple treatments by using the odontogram to select multiple tooth sites, and you indicate no discipline for these treatments, axiUm displays a warning that the discipline is missing, and this is fine. However, closing this warning displays it again.

**Solution:** Fixed so that in the above scenario, axiUm displays the warning only once.

140071 - Message displays multiple times

**Module:** EHR - Forms tab

**Problem:** When two different users on two different workstations have two different patients open, and the users answer the same EPR question, axiUm displays the message, “This checklist is already being answered by another user. Please try again later”. Because each workstation is displaying a different patient, this message is unnecessary.

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

140225 - Auto spellcheck is not saving changes

**Module:** EHR ~ Template Note window

**Problem:** When you have auto-spellcheck turned on (in Tools menu - User Preferences option, the Auto Spell Check Clinical Notes option is selected), and you add a template note that contains a spelling error, axiUm displays the Check Spelling window, and this is fine. However, if you select the correct word and close the Check Spelling window, axiUm does not save the changes. When you open the note, axiUm still displays the incorrect word. This only applies to template note long answers.

**Solution:** Fixed.

140226 - Select Procedure window’s Expert tab shows conditions

**Module:** EHR ~ Treatment Plan window

**Problem:** If you go to the treatment plan option and open the procedure entry pop-up window, and then you click the Procedure field (ellipses) to display the Select Procedure window, the Expert tab displays conditions. The treatment planning module does not support the entry of conditions.

**Solution:** Fixed so that the Select Procedure window no longer displays conditions.

140486 - Dutch version shows Medical Txs option

**Module:** EHR
Problem: This affects Dutch version only. Because axiUm’s Dutch version supports only dental claims, it is unnecessary to display the Medical Tx option in the Chart Add tab and the Select Procedure window.

Solution: Fixed by removing the Medical Tx option from the Chart Add tab and also from the Select Procedure window.

140528 - Select Procedure window’s Expert tab shows all diagnoses
Module: EHR ~ Treatment Plan window

Problem: This occurs if you go to the Diagnoses tab and add multiple diagnoses, but in the treatment plan option you select only one of these diagnoses. Then when you click the Procedure field (ellipses) to display the Select Procedure window, the Expert tab displays all diagnoses you entered in the Diagnoses tab.

Solution: Now in the above scenario, only those diagnoses you selected for this treatment record are displayed.

140594 - Closing the Treatment Plan window causes crash
Module: EHR ~ Treatment Plan window

Problem: When you approve treatments in a treatment plan, axiUm saves the records to the patient's chart. During this process, if you close the Treatment Plan window, axiUm crashes. This causes some of the treatments to be approved but not saved.

Solution: Now if axiUm is in the process of saving, you cannot close the Treatment Plan window.

140630 - Pressing the Enter key closes the window
Module: EHR ~ Treatment Plan window

Problem: When you click on an ellipsis of any field to open the associated window (e.g. Select Procedure window) and you immediately press the Enter key, axiUm closes the window.

Solution: Fixed so that in the above scenario, the window remains open.

140656 - Treatment Plan window cannot be minimized
Module: EHR ~ Treatment Plan window

Problem: When you click (minimize), the Treatment Plan window fails to remain minimized.

Solution: Fixed.

141086 - Refresh issue
Module: EHR ~ Treatment Plan window
Problem: When you go to the Problems tab and select a record (one that is linked to a record in the Diagnoses tab), and then you change the tooth site for this problem, axiUm fails to immediately update this change in the Diagnoses tab. This is a refresh issue.

Solution: Fixed refresh issue.

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**General**

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**140983 - Signature pad takes a long time to display**

**Module:** Signature

**Problem:** If you are using the T-S460-HSB-R model of the Topaz signature capturing device, axiUm takes a long time to display this on the screen.

**Solution:** Fixed to improve loading time.

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**Info Manager**

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**139522 - Problems with the A/R Reconciliation report**

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

**Problem:** In the A/R Reconciliation report (by department), the deleted treatments display the incorrect amount for the old totals and new totals.

**Solution:** Fixed to display the correct amounts.

---

**140329 - Internet User (Patient) Info report causes SQL error**

**Module:** Info Manager ~ Internet User (Patient) Info report

**Problem:** When you edit the Internet User (Patient) Info report by opening the Report Definition window, selecting the Audit User Info file, and adding any of its fields to the report, running this report displays an SQL error.

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

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**Inventory**

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**140463 - Repackaging product causes SQL error**

**Module:** Inventory ~ Repackage Product window
Problem: When you repackage a product, axiUm displays an SQL error.
Solution: Fixed so that in the above scenario, axiUm no longer displays an SQL error.

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**Maintenance**

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**140127 - Issues with Held claim printing**

Module: Maintenance ~ Print Held Claims window

Problem: If there is a problem when printing held claims, axiUm continues the process instead of aborting.

Solution: Now in the above scenario, axiUm displays the message, “Print Held Claim process is aborted due to printer problem!”

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**140397 - The Additional button should be disabled**

Module: Maintenance ~ Form Item - Spreadsheet Row window

Problem: This problem occurs in user forms. When adding or editing the setup of a spreadsheet row, the Additional button is not applicable and should be disabled.

Solution: Fixed so that in the above scenario, the Additional button is disabled.

---

**140622 - Routine applies pre-payments if a payment plan is involved**

Module: Maintenance

Problem: The OVERNIGHT_STD_PKG.APPLY_ALL_PREPAYMENTS retrieves the PayPlanId from the TRX record allocated to the pre-payment office charge, not from the pre-payment office charge itself.

Solution: Fixed to retrieve the correct PayPlanId.

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**Messenger**

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**140550 - Messages from patients use incorrect text color**

Module: Messenger ~ View Message window

Problem: When you receive a message from a patient, the Patient static field is displayed in black text.

Solution: Fixed so that in the above scenario, the Patient static field displays green.
140554 - Text in subject line is missing
Module: Messenger
Problem: If you receive a message where the body displays no text and the Subject field displays the maximum number of characters allowed, and you reply to this message, axiUm clears the Subject field in the recipient's message.
Solution: Fixed so that in the above scenario, axiUm retains the Subject field.

140557 - Inbox displaying incorrect count
Module: Messenger ~ Delete/View Message window
Problem: When you read or delete a message from the Inbox, axiUm fails to update the count immediately.
Solution: Fixed so that in the above scenario, axiUm updates the count immediately.

140940 - axiUm should prevent the entry of patients in the BCC field
Module: Messenger
Problem: When you send messages to a patient, axiUm lets you BCC them.
Solution: Fixed so that patients cannot be selected in the BCC field.

141096 - Deleting message corrupts recipient's message
Module: Messenger
Problem: When you go to the Sent folder and delete a message, the associated message in the recipient's Inbox become corrupted.
Solution: Fixed so that in the above scenario, the recipient's message is not corrupted.

Ortho Manager

140792 - axiUm crashes when user clicks Code ellipsis in edit mode
Module: Ortho Manager ~ Edit Planned Ortho Treatment window
Problem: If you go to the Code field and click (ellipsis), axiUm crashes.
Solution: Fixed so that in the above scenario, axiUm no longer crashes.
**PowerAdmin**

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**140595 - Applying Ins. Payment window's Load All button is missing**

**Module:** PowerAdmin ~ Applying Ins. Payment window

**Problem:** In the Applying Ins. Payment window (in Power Admin window - Dialogs section - TRANSACTIONS section - Applying Ins. Payment item), the Load All button is missing.

**Solution:** This button is now available.

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**Transactions**

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**140046 - HISTORYTYPE is not delete for Type 73 records**

**Module:** Transactions - Pmt Plan tab

**Problem:** When a payment plan contains a portion of a patient payment, and then the payment plan is either closed or deleted, the HISTORY. HistoryType = 3 (not 4) for Type 73 and Type 74 records.

**Solution:** Fixed so that in the above scenario, when the payment plan is deleted, HISTORY. HistoryType = 4 for Type 73 and Type 74 records.
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EHR

139711 - Cannot add quote text
Module: EHR ~ Treatment Planning window
Problem: This problem occurs if you have purchased the Patient Estimates module. If you add a treatment record in the treatment plan option, and you select to add quote text, axiUm does not add this to the treatment record.
Solution: Fixed so that in the above scenario, axiUm adds the quote text you selected.

139882 - Cannot add problem using intellisense
Module: EHR ~ Treatment Plan window
Problem: If you have your workstation set up to display a greater number of problems than the total number of problems in the PROBLEM table (in the Set Station Options windows - General section - Intellisense section - MaxDisplayAll item), and you go to the Treatment Plan window’s Problem tab’s entry pop-up window and you select a problem from the intellisense field (without using the keyboard), and then click add, axiUm closes the entry pop-up window but fails to add the selected problem.
Solution: Fixed so that in the above scenario, axiUm adds the selected problem.

140396 - Changing procedure code does not update Surface field
Module: EHR ~ Treatment Plan window
Problem: If you go to the treatment plan options and create a record containing a procedure code that requires a site and surface, and then later you select a different procedure code that requires only a site (no surface), axiUm retains the surface from the previously selected procedure.
Solution: Fixed so that in the above scenario, axiUm clears the Surface field.

140408 - History fields are blank for converted treatment plans
Module: EHR ~ Treatment Plan History window
Problem: The history for converted plans in version 5.20 does not show all historical information. The following fields are blank:
- Selected Option
- Appr. User
Solution: Fixed so that when you open the Treatment Plan History window, axiUm displays all historical information.

140591 - Removed the “x” (close) from the Billing Options for Planned Treatment window

Module: EHR ~ Billing Options for Planned Treatment window

Problem: If you go to the PowerAdmin module and in the Billing Options for Planned Treatment window you set the Cancel button to yellow (i.e. read-only) or red (i.e. disabled), this prevents the user from clicking this button and closing this window. However, you can go to this window in axiUm and click (close) to get around this.

Solution: Removed (close) from the window. If the Cancel button is disabled, pressing the Esc key does nothing. If the Cancel button is enabled, then pressing the Esc key closes this window.

140632 - Label on treatment option tab is confusing

Module: EHR ~ Treatment Plan window

Problem: The treatment option tab is labeled with a plus sign (+). This can appear to indicate that clicking the tab adds a procedure instead of creating an additional treatment option.

Solution: Fixed by changing the tab label to “+ (New Option)”.

140661 - Discipline should not default on edit

Module: EHR ~ Treatment Plan window

Problem: When you go to the treatment entry pop-up window and select a procedure code (one with a default discipline), and you make the discipline blank, axiUm saves the treatment record without a discipline, and this is fine. However, when you re-open the treatment entry pop-up window, axiUm automatically displays the default discipline.

Solution: Fixed so that in the above scenario, axiUm leaves the discipline blank.

140772 - Hitting cancel on the progress window is misleading

Module: EHR ~ Treatment Plan window

Problem: When axiUm is in the process of saving the treatments to the patient’s chart, and you click the Cancel button on the progress window, axiUm still saves all the treatments.

Solution: Fixed by removing the Cancel button from the progress window to avoid confusion.
141082 - Can access treatment records without access rights

Module: EHR - Tx History tab

Problem: If provider A creates an in-process treatment, and then provider B (who has no access to this procedure) modifies this treatment record, axiUm asks if you want to change the provider on this treatment from provider A to provider B, even if provider B has no access to this treatment.

Solution: Fixed so that in the above scenario, axiUm no longer asks provider B if they want to change the provider on the selected treatment. Instead, axiUm displays the message, “Select procedure is not accessible for this Provider Type!”

141212 - Ability to submit electronic prescriptions for controlled substances with eRx

Module: EHR - Medications tab

Problem: When you use eRx to send electronic prescriptions for controlled substances (Schedules 1 and 2), DrFirst™ Rcopia® requires the patient's full address. Currently, axiUm sends only the patient's zip code.

Solution: Now axiUm sends and updates the following additional patient information:
- Address1
- Address2
- City
- State

141281 - Preview causes crash

Module: EHR ~ Treatment Plan window

Problem: This problem occurs when you preview a treatment plan draft, and then close both the preview and the Treatment Plan window. Then if you go back to preview another treatment plan draft, axiUm crashes.

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

141833 - Previewing EPR form resizes image

Module: EHR - Forms tab

Problem: If you open an EPR form containing an image-type question, and you make changes to this image and then close it and preview the form, axiUm increases the image size. This distorts the image and may not fit on the page.

Solution: Fixed so that in the above scenario, axiUm retains the image size.
141940 - List-type answers shows as unanswered

**Module:** EHR - Notes tab

**Problem:** When you answer a list-type question, then highlight a different question, and then return to the question you just answered, axiUm displays these as unanswered.

**Solution:** Fixed so that in the above scenario, axiUm retains the answer.

141961 - Patient approval causes SQL error

**Module:** EHR ~ Treatment Plan window

**Problem:** If you select a treatment plan containing the same diagnoses code more than once, and then you run the patient approval process, axiUm displays an SQL error.

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

### General

139940 - Drop-down fields are missing the highlight bar

**Module:** GUI

**Problem:** In various areas of axiUm, the drop-down fields are missing a highlight bar. This makes it difficult to see what you are selecting.

**Solution:** Fixed so that these drop-down fields show a highlight bar.

140986 - Restricting users to one session not working with active directory

**Module:** Login

**Problem:** If you have Active Directory turned on, axiUm sometimes still lets you log on to multiple workstations.

**Solution:** Fixed so that axiUm obeys the Power Admin module's "Users restricted to one active session" setting when using Active Directory.

### Info Manager

141666 - Lost the ability for creators to access reports

**Module:** Info Manager
Problem: In version 5.20, users (who created reports, letters, and labels in previous versions) have now lost the ability to edit them. For example, in version 5.11 if user A created a report for user B, and then they upgraded to version 5.20, user A is no longer able to access this report.

Solution: Fixed so that during the conversion to 5.20, user A is properly given access to reports, letters, and labels that they created for other users/levels.

---

142058 - Word label template does not close after saving

Module: Info Manager

Problem: If you open a Word label template through the Patient Card window, and you save this label template, Word does not close. This appears as if it failed to save, but in the background it is saving a copy of the label template each time you select to save.

Solution: Fixed so that in the above scenario, Word closes after the first save.

---

Maintenance

141826 - Speed issue

Module: Maintenance ~ Utilities window

Problem: Running the overnight process to apply all payments (in Family mode) is slow.

Solution: Fixed to improve speed.

---

Messenger

142121 - Patient re-assignment shows incorrect provider

Module: Messenger

Problem: If you assign provider A to a patient, and then you change it to provider B, axiUm sends you an automated message, and this is fine. However, the message indicates that provider B was unassigned (not provider A).

Solution: Fixed so that in the above scenario, axiUm’s automated message indicates provider A.

---

Patient Assignments
140686 - Patient Assignments Setup window shows deprecated option

**Module:** Patient Assignments ~ Patient Assignments Setup window

**Problem:** In the Assignment Based On section, axiUm displays the General Tx Codes option. When this option is selected, axiUm defaults the Patient Assignments window's Request Type drop-down field to display the General Tx option, but this option no longer exists in axiUm.

**Solution:** Fixed so that the Assignment Based On section displays only the Patient Need Codes option and the Tx Procedure Codes option.

---

**Patient Card**

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141183 - Cannot input numbers in name field in CA version

**Module:** Patient Card ~ Patient Info window

**Problem:** This affects Canadian versions only. When you are creating a new patient record, axiUm disallows you from entering numbers in the name fields (e.g. Middle field). When you press a number on your keyboard, these fields show nothing.

**Solution:** Fixed so that you can enter numbers in these fields.

---

**Rolodex**

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141179 - Incorrect behavior of inaccessible appointment codes

**Module:** Rolodex ~ Patient Recalls window

**Problem:** When you view a patient recall record containing an appointment code that the provider can no longer access, axiUm displays a blank Appt. Code drop-down field. Because this appointment code was used when this provider still had access to it, axiUm should continue to display it when you view this recall record.

**Solution:** Fixed.

---

**Scheduler**

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139610 - Overriding chair reservation displays unnecessary prompt

**Module:** Scheduler - Chair tab

**Problem:** When provider A has a clinic time exception (and is also available in another clinic) and you try booking provider A in that other clinic by overriding provider B's chair reservation, axiUm displays the Cancel Clinic Time Exception Warning window.
Solution: Fixed so that in the above scenario, axiUm no longer displays the Cancel Clinic Time Exception Warning window.

---

140369 - Re-assigning appointments crashes axiUm
Module: Scheduler - Active tab
Problem: In some cases, reassigning all appointments from one provider to another causes axiUm to crash.
Solution: Fixed.

---

140664 - Updating recurring clinic time exceptions are not updated
Module: Scheduler - Active tab, Weekly tab
Problem: If you create a recurring clinic time exception from clinic A to clinic B, axiUm updates the appointment book to show that the provider is available in clinic B, and this is fine. Then if you change the exception from clinic B to clinic C, axiUm fails to update the appointment book. It shows you are still available in clinic B (even though you are now unavailable here), and if you try booking in clinic C, axiUm prompts you to delete your clinic time exception first (even though your exception lets you access clinic C).
Solution: Fixed so that in the above scenario, axiUm prevents you from accessing clinic B and lets you access clinic C.

---

141748 - Unnecessary window when creating clinic time exception
Module: Scheduler
Problem: When a provider has an appointment booked in a clinic, and you create a clinic time exception for this provider to be in this clinic, axiUm displays the Unschedule Appointment Warning window.
Solution: Fixed so that in the above scenario, axiUm no longer displays this warning.

---

141802 - Creating clinic time exception causes database warning
Module: Scheduler
Problem: When you add a clinic time exception for a clinic containing appointments, axiUm displays the Unschedule Appointment Warning window, and this is fine. However, if you click the Yes button, axiUm displays a database warning.
Solution: Fixed so that in the above scenario, axiUm no longer displays the database warning.

---

141926 - Unable to unreserve second provider
Module: Scheduler - Chair tab
**Problem:** When a chair has more than one partial reservation within a session, the Unreserve Second Provider right-click option is available only if the first partial reservation has a second provider on it. This prevents you from unreserving the second provider from subsequent partial reserves.

**Solution:** Fixed so that in the above scenario, the Unreserve Second Provider right-click option is enabled.

---

**141945 - Reassigning appointment causes crash**

**Module:** Scheduler - Active tab

**Problem:** In some cases, reassigning appointments from provider A to provider B (who has partial-day clinic time exception and is also unavailable to all clinics), causes axiUm to crash.

**Solution:** Fixed crash.

---

**142029 - Unreserving chair causes crash**

**Module:** Scheduler - Chair tab

**Problem:** In certain instances, unreserving a chair would cause a SQL error.

**Solution:** Fixed to no longer display the SQL error.

---

**Transactions**

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**129798 - PowerAdmin settings not working**

**Module:** Transactions - Ins Pmt tab

**Problem:** axiUm disobeys the PowerAdmin settings for the following Insurance Payments window’s right-click options:

- Add Attachment
- View Attachment
- Delete Attachment

**Solution:** Fixed so that these right-click options obey PowerAdmin settings.

---

**141014 - Refresh issue**

**Module:** Transactions - Payment tab

**Problem:** In some cases, the Patient Payments sub-tab displays records from the previously selected patient. This is caused by a refresh issue.

**Solution:** Fixed refresh issue.
129798 - PowerAdmin settings not working

**Module:** Transactions - Ins Pmt tab

**Problem:** axiUm disobeys the PowerAdmin settings for the following Insurance Payments window's right-click options:
- Add Attachment
- View Attachment
- Delete Attachment

**Solution:** Fixed so that these right-click options obey PowerAdmin settings.

---

141194 - Can hold payments for a non-patient guarantor

**Module:** Transactions - Payment tab

**Problem:** axiUm lets you hold a payment for a guarantor who is not a patient. Because no treatments can be performed on a non-patient, it is unnecessary to hold payments for this guarantor.

**Solution:** Fixed. Now in the above scenario, axiUm no longer displays this guarantor in the Held For drop-down field.

---

142085 - Payment plan buckets show incorrect amount

**Module:** Transactions - General tab

**Problem:** In some cases, if the Transaction Option window's Display Options section has the Open Item option selected, and you reverse a payment (that is held for a payment plan), axiUm displays this reversed amount as the patient balance.

**Solution:** Fixed so that in the above scenario, axiUm displays the correct patient balance.
axiUm Release 5.20.05

EHR

141845 - Approving lab order checks incorrect discipline list

**Module:** EHR ~ Add Lab Order window

**Problem:** When an instructor (restricted to approving only specified disciplines) approves a lab order, axiUm sometimes displays a message indicating they cannot approve this discipline.

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

142098 - Searching for procedure by description causes crash

**Module:** EHR

**Problem:** When procedure code description is greater than 14 characters and you searched for this procedure (by description), axiUm crashes.

**Solution:** Fixed crash.

142208 - Display issue with Treatment Plan window

**Module:** EHR ~ Treatment Planning window

**Problem:** This is a display issue with the custom fields Treatment (Clinical 1 - 2). If you go to the PowerAdmin module and *disable only the description* of the first custom field, but *enable both the field and description* of the second custom field, this causes a strange display in the treatment option pop-up window where these fields reside.

**Solution:** Fixed so that in the above scenario, axiUm displays these two custom fields correctly.

142229 - Template note answers are missing during edit/approval

**Module:** EHR ~ Approve Template Note window

**Problem:** This problem occurs if you add a template note, select the note code, answer at least one question, and then click (ellipses) again to view the Clinical Note Codes List window but close it without selecting a different note code. When you close this template note, axiUm saves the answers, and this is fine. However, if you open the note, either in edit mode or during approval, these answers are missing.

**Solution:** Fixed so that in the above scenario, axiUm retains the answers.
142258 - Display issue in Treatment Plan window’s Problems area

Module: EHR ~ Treatment Plan window

Problem: If you go to the PowerAdmin window - Dialogs branch - ELECTRONIC HEALTH RECORD (EHR) section - Tx Plan section - Treatment Plan item - Treatment Plan window, and you set the Problems area or the Expand button in the Problems area to red, the associated areas in axiUm are missing most of the fields.

Solution: Fixed display issue.

142259 - axiUm crashes when Treatment Plan window is open

Module: EHR ~ Treatment Plan window

Problem: In Windows XP workstations, axiUm crashes if you have the Treatment Plan window open and you do one of the following:

• Close axiUm
• Switch user
• Log off

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

142275 - Selecting right-click option causes crash

Module: EHR - Labs tab

Problem: If the list view contains no records, and you select the Re-open right-click option, axiUm crashes.

Solution: Fixed so that if the list view contains no records, this right-click option is disabled.

142300 - Adding treatments to treatment plan changes the sequence

Module: EHR ~ Treatment Plan window

Problem: When adding multiple treatments to a treatment plan containing phase and sequence, axiUm was auto re-assigning sequences when duplicates were found within the same phase. This is not always the desired behavior.

Solution: Fixed. Now there is an Auto Re-assign Sequences right-click option (new). Selecting this right-click option turn on or off auto-sequencing for your workstation.

142305 - Refills field is disabled

Module: EHR ~ Patient Prescription Entry window

Problem: If you go to the Drug field and enter an undefined drug, axiUm disables the Refills field.
Solution: Fixed so that this field is enabled.

---

142317 - Provider not always updated when completing in-process tx

**Module:** EHR ~ Treatment Plan window

**Problem:** This problem occurs when provider A adds an in-process treatment and receives approval for it. Then when provider B logs on and completes this treatment, and in the Assign Current Provider Warning window they click the Yes button, The Tx History tab’s Prov/User column still displays provider A.

**Solution:** Fixed so that in the above scenario, axiUm displays provider B.

---

**Info Manager**

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138716 - Info Manager report is missing some treatment plan fields

**Module:** Info Manager ~ Treatment Plan Txs report

**Problem:** The Treatment Plan Txs report is missing some related treatment plan fields.

**Solution:** Fixed to make all applicable tx plan fields available to add to the report.

---

142117 - Closing axiUm causes crash

**Module:** Info Manager

**Problem:** In some cases, if you preview a report and then close the application, axiUm crashes.

**Solution:** Fixed crash.

---

142265 - Running certain reports causes SQL error

**Module:** Info Manager ~ Patient Surveys report, Medical Alerts report

**Problem:** When you go to the Patient Surveys report or the Medical Alerts report, and you add the Pt. Problems.Pt Prob Surface field or the Pt. Problems.Pt Prob Site field, and then you run these reports, axiUm displays an SQL error.

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

---

142321 - Running Clinical Charts report causes SQL error

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

**Problem:** If you add the Clinical Diagnosis Codes. Diag. Code Description field and run the Clinical Charts report, axiUm displays an SQL error.
**Solution:** Fixed so that in the above scenario, axiUm no longer displays an SQL error.

---

**Ortho Manager**

142249 - Editing approved treatments & notes should remain approved  
**Module:** Ortho Manager  
**Problem:** When you (a user who requires no approval) edit an approved ortho treatment, the ortho treatment and any associated note should remain approved.  
**Solution:** Fixed.

---

**Patient Attachments**

141023 - Duplicate final letters  
**Module:** Patient Attachments  
**Problem:** In Patient Attachments, when creating Letters from pre-defined Patient Reports, if the query returns more than one row, saving the letter as a draft, then later editing it to save as a final copy was resulting in multiple copies of the letter being saved to Patient Attachments. This is an unusual situation and would only result if the report query could return more than one record for the same patient (example: Report includes provider fields and there is more than one provider assigned to the patient).  
**Solution:** Now, when draft letters are edited, if multiple rows have been returned by the query, only one copy of the letter will be opened. The body of the letter can be edited but adding new Merge fields will be disabled.

---

**Perio Chart**

142279 - PSR scores are overwritten  
**Module:** Perio Chart  
**Problem:** This occurs when there is only one perio exam listed in the EHR window’s Perio tab and the PSR scores for this exam are blank. Then if you manually enter PSR scores in an EPR form through the Perio Chart module and then view them in the EHR window’s Perio tab, axiUm clears these new values.  
**Solution:** Fixed so that in the above scenario, the PSR scores are retained.
**Personal Planner**

**142147 - Search process not considering code type**

**Module:** Personal Planner ~ Need Request window

**Problem:** When the Type drop-down field displays the Patient Need option, and you go to the Code field and enter an intellisense search criteria, axiUm displays matching procedure codes instead of matching patient need codes.

**Solution:** Fixed so that if the Type drop-down field displays the Patient Need option, axiUm no longer searches on procedure code when typing in this field.

---

**PowerAdmin**

**140938 - Display issue in the About PowerAdmin window**

**Module:** PowerAdmin ~ About PowerAdmin window

**Problem:** Sometimes, the Database Connection text does not display correctly.

**Solution:** Fixed to display this information correctly.

---

**Scheduler**

**138897 - Display issue with the Additional info (Spacebar) right-click option**

**Module:** Scheduler ~ Appointment Lists window

**Problem:** This problem occurs if you have axiUm set up to manually display list pop-ups (in the List Popup Options (Appointments) window, the *Manually by pressing the spacebar* option is selected). Then if you go to the Appointment Lists window and you highlight a record, pressing the spacebar displays the list pop-up, and this is fine. Then if you highlight the same record but this time select the Additional Info (Spacebar) right-click option, axiUm closes the list pop-up, and at this point axiUm should have deselected this right-click option. However, if you highlight the record again and you right-click to view the list of options, this right-click option is still selected.

**Solution:** Fixed so that in the above scenario, the Additional Info (Spacebar) right-click option is deselected.

---

**141938 - Duplicate records**

**Module:** Scheduler ~ Provider Schedule Detail History (for Exception) window
**Problem:** When you re-assign appointments from provider A in chair A to provider A in chair B (same provider, different chair), axiUm displays duplicate records of Type=Added in the Provider Schedule Detail History (for Exception) window.

**Solution:** Fixed so that in the above scenario, axiUm creates one record of Type=Add and another record of Type=Updated.

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**Transactions**

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**142144 - Unallocating insurance adjustment causes axiUm to hang**

**Module:** Transactions - General tab, Treatment tab

**Problem:** When you unallocate an insurance adjustment (by going to the General tab or Treatment tab, highlighting a treatment line from the list view, selecting the Show Allocations right-clicking option, and then unallocating an adjustment from the Allocations window), axiUm hangs. Note that this is not a common workflow. Deleting an insurance adjustment by going to the Insurance Payments tab and selecting the Show Adjustments right-click option works fine.

**Solution:** Fixed so that unallocating an insurance adjustment this way no longer causes axiUm to hang.

---

**142180 - Incorrect applied & remaining amounts for insurance**

**Module:** Transactions

**Problem:** This problem occurs if you go to the Applying Ins. Payment window to allocate an insurance payment to a treatment, but then later unallocate the funds from the treatment. Then if you change the total amount of the original insurance payment, axiUm sets the applied and remaining amounts incorrectly.

**Solution:** Fixed so that in the above scenario, axiUm shows the correct applied and remaining amounts.

---

**142185 - STATEMNT table is missing Type 2 records**

**Module:** Transactions

**Problem:** Due to changes in version 5.10, Type 2 records were no longer showing in statement tables. Need to reinstate the display of Type 2 records although the amount is always $0.

**Solution:** Fixed.
142562 - Problems with Income Tax Receipt

Module: Dispensary ~ Income Tax Receipt report

Problem: The Income Tax Receipt report has the following problems:
- Date field is too short for displaying long dates (e.g. December 31, 2013).
- Payments have a negative value.
- Charges have a positive value.

Solution: Fixed the above problems:
- Increased length of the Date field.
- Payments have a positive value.
- Charges have a negative value.

EDI Claims

142545 - Three-unit treatments cause EDI medical claim rejections

Module: EDI Claims

Problem: EDI Claims are rejected when a treatment line displays a Unit value greater than 99 (two digits). This is caused by an incorrectly formatted SV1*05 (Place of Service) when Units is greater than two digits. This problem occurs in both 4010 and 5010 versions.

Solution: Fixed so that in the above scenario, both the Units value (SV1*07) and the Place of Service value (SV1*05) are formatted correctly and the claim is not rejected.

EHR

138483 - Need a Show Deleted check box

Module: EHR ~ Treatment Plan window
**Problem:** The Show Deleted check box for Treatment Planning Notes is missing. There is no way to hide notes that have been deleted.

**Solution:** The Show Deleted check box (new) has been added to the Treatment Plan Notes dialog. When the check box is selected, deleted notes are shown in gray.

![Treatment Plan Notes dialog](image)

---

**139104 - Display issue**

**Module:** EHR ~ Treatment Plan window

Problem: When you enter treatments in the Treatment Plan window, and axiUrn displays a warning indicating that you did not enter the discipline, followed by the Similar Planned Treatment Warning window, axiUmr adds the treatment record correctly, and this is fine. However, if you hover the mouse on the window, axiUrn displays a square in the list area.

**Solution:** Fixed display issue.

---

**141135 - Selecting a problem for multiple teeth adds only one problem**

**Module:** EHR ~ Treatment Plan window

**Problem:** If you go to the odontogram and select two teeth, and then you go to the Problems tab and enter one problem, axiUrn adds the problem records with no tooth information.

**Solution:** Fixed so that in the above scenario, axiUrn adds the problem records with the tooth information.

---

**141715 - Inconsistent behavior of intellisense**

**Module:** EHR ~ Treatment Plan window

**Problem:** This problem occurs if your intellisense station option’s MaxDisplayAll setting is a number greater than the total number of problems (in Maintenance - EHR tab - Problem Codes icon). Then when you go to the Diagnoses tab and click the **New item** text, the intellisense list displays momentarily and then closes.

**Solution:** Fixed so that in the above scenario, the intellisense list remains displayed.

---

**142320 - Selecting new drug does not reset PRN checkbox**

**Module:** EHR ~ Patient Prescription Entry window
Problem: When you go to the Patient Prescription Entry window and add a drug (that allows unlimited refills) and you selected the PRN checkbox for this drug, and then you select another drug (that also allows unlimited refills), the PRN checkbox remains selected from the previously added drug record.

Solution: Fixed so that in the above scenario, axiUm resets this checkbox.

142329 - Clinical diagnosis codes containing long notes causes crash

Module: EHR - Chart Add tab

Problem: This problem occurs if you have a diagnosis code containing a long note (about 1,000+ characters) with no spaces between in the text. The when you enter its description in an intellisense field, axiUm either freezes or crashes.

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

142331 - Template notes are not saved

Module: EHR - Notes tab

Problem: When you add a phase/sequence to an unapproved template note (by going to the EHR window - Tx History window - Assign Phase/Seq right-click option - Assign Phase/Seq window), and then approve or edit this note, axiUm no longer displays the previously entered answers.

Solution: Fixed so that in the above scenario, axiUm retains the answers.

142351 - Expand buttons are not obeying PowerAdmin settings

Module: EHR ~ Treatment Plan window

Problem: When you go to the PowerAdmin module and for the Expand buttons you set these to red, the associated buttons in axiUm are disabled, not hidden.

Solution: Fixed so that in the above scenario, these buttons are hidden.

142378 - Switching to macro procedure code should be disallowed

Module: EHR ~ Treatment Plan window

Problem: axiUm lets you edit a treatment plan record by changing its procedure code to a macro procedure code. axiUm should disallow this.

Solution: Fixed so that in the above scenario, axiUm displays the message, “Invalid Procedure Code”.

142449 - Adding treatment freezes axiUm

Module: EHR - Chart Add tab
**Problem:** Sometimes, if you leave the diagnoses pop-up window open while adding the treatment record, axiUm displays the Similar Planned Treatment Warning window in the background, making the application appear to hang.

**Solution:** Fixed so that in the above scenario, axiUm displays the Similar Planned Treatment Warning window in the foreground.

---

**142458 - Incorrect audit record**

**Module:** EHR ~ Medication Reviews window

**Problem:** When you review a patient medications in eRx, axiUm creates two different audit records, one record displaying the correct time and the other record showing an incorrect time. This second record is due to the time zone offset between eRx and the axiUm server.

**Solution:** Fixed so that in the above scenario, axiUm creates only one audit record and also now has the ability to define time zone offset. For eRx users, Medication reviews must now only be done in eRx.

Setup default time zone offset:

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

2. Go to EHR section- Prescriptions section - eRxTimezoneOffset item (new).
3. In the Current Value field, specify the number of hours that the eRx server is offset from the axiUm server.

The eRx server is currently in the Eastern Time Zone, so this value should be set to the difference in hours that the Eastern Time Zone is from your axiUm server. For example, if your server is in the Pacific Time Zone, enter 3. The default for this station option is 0. We suggest that you update the default value according to your needs and perhaps add a comment noting the time zone of the eRx server and your axiUm server.

Note: If your server location does not observe Daylight Savings Time, this value may need to change throughout the year.

4. Click \(\text{Modify Record}\).  

axiUm saves the changes.

Usage:

1. Open the eRx Options window.

   Go to Maintenance window - System tab - Station Option icon - Station Options window - eRx Options button.
There is a Time Zone Offset (from axiUm Server) field (new). This field defaults to the number of hours that eRx is offset relative to the axiUm server, as we defined in the setup (i.e. 3 hours). You can change this, but it is recommended to change the Default Value in Station Options and then individual station values are not required.

2. Click the OK button.
   axiUm closes the eRx Options window and returns to the Maintenance window.

3. Go to the EHR window’s Medications tab.

4. From the list view, highlight a record.
5. Click ✪ (Review Medications).

axiUm does one of the following:

- If you are using eRx, axiUm displays a message:

  ![Message](image)

- If you are not using eRx, axiUm converts the review time based on the offset indicated in the setup.

#### 142463 - Lab field not displaying default value

**Module:** EHR - Labs tab  

**Problem:** When you create a new lab order, the Lab field fails to display the default value (defined in the Station Options window’s LastLabCode item).  

**Solution:** Fixed so that in the above scenario, the Lab field displays the default value.

#### 142485 - Copied treatment plans are not displaying treatments on odontogram

**Module:** EHR ~ Treatment Plan window  

**Problem:** When you copy a treatment plan (by going to EHR window - Tx Plans tab - ✷ (Copy Record)), the planned treatments are not indicated on the odontogram.
Solution: Fixed so that any treatments planned on the odontogram are transferred from the original record to the copied record.

---

142495 - Last Reviewed field is not updated

Module: EHR - Medications tab

Problem: When you review a medication in eRx, axiUm does not update the Last Reviewed static field to reflect this.

Solution: Fixed so that this field displays the last reviewed date.

---

142504 - Opening the Select Procedure window causes crash

Module: EHR - In Progress tab

Problem: When you open a treatment record (e.g. Edit Planned Treatment window) and you click the Code (ellipsis), axiUm crashes instead of displaying the Select Procedure window.

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

---

142532 - Review Date is blank when eRx is turned off

Module: EHR - Medications tab

Problem: If you are not using eRx, reviewing medications sometimes creates a review record with a blank date.

Solution: Fixed so that in the above scenario, axiUm populates the date.

---

142554 - axiUm crashes when eRx is down

Module: EHR

Problem: When logging on to axiUm as an eRx user, if the eRx system is down and axiUm can’t connect to it, the user should be able to successfully log on to axiUm by either waiting for the eRx Connection dialog to close on its own, or by pressing the Cancel button. Currently, this causes axiUm to crash.

Solution: Fixed so that the user can successfully log on to axiUm without an eRx connection.

---

142563 - Entering diagnosis with no diagnosis category causes crash

Module: EHR ~ Treatment Plan window

Problem: If you go to the Diagnosis tab and enter a diagnosis code belonging to a diagnosis category that no longer exists, axiUm crashes. This is not a scenario that can be created within axiUm. This bad data situation is caused by deleting diagnosis categories directly from the database via SQL.
Solution: Now in the above scenario, axiUm displays the message, “It is not possible to find and add this diagnosis.”

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**General**

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**138681 - Warning windows are hidden in the background**

*Module*: Error Messages

*Problem*: Sometimes, when you quickly switch focus between axiUm and other applications, axiUm’s warning message displays behind the other application, making axiUm appear to freeze.

*Solution*: Fixed so that in the above situation, axiUm displays the warning message in the foreground.

---

**139413 - Cancelling spell check displays incorrect message**

*Module*: Check Spelling window

*Problem*: When you open the Check Spelling window and click the Cancel button, axiUm displays the message “Spell Check is complete.” Because you cancelled the process, this message is incorrect.

*Solution*: Fixed so that in the above scenario, axiUm displays no messages.

---

**142150 - Database commit not performed at end of stored procedure**

*Module*: Database

*Problem*: When axium.ini DBEngine=5 (OCCI) and database calls are done from within a stored procedure, the database commit is not done until the next time a database call is made. This could only potentially cause a problem with if axium was terminated before this commit was done.

*Solution*: Fixed so that in the above scenario, axiUm commits database calls immediately.

---

**142256 - T3 IVR lets you cancel checked-out appointments**

*Module*: T3 IVR

*Problem*: T3 IVR lets patients cancel appointments that you already checked out earlier that day.

*Solution*: Fixed so that axiUm loads only future appointments with an active status (i.e. no checked-in and/or checked-out statuses).
142295 - Custom reports allowing optional parameters causes error message

**Module:** Reports

**Problem:** When you launch any crystal report that allows optional parameters (but you enter none), axiUm displays the message, "Crystal .NET Engine Error: Request cancelled by the user".

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

142384 - Registration window not displaying

**Module:** General

**Problem:** When you go to the eRx and click the Lab: Orders/Results button, the system hangs.

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

142431 - Removing optional column still shows that column

**Module:** General

**Problem:** If you remove the Rolodex window's last optional display column (by going to the Patient Options window and setting Display Column 10 (optional) drop-down field to blank), axiUm still shows this column, and this is fine. However, clicking this column displays a Database Warning window.

**Solution:** Fixed so that in the above scenario, the column is removed and any previous search results remain.

142513 - Problem with Topaz signature pad on thin client

**Module:** Signature

**Problem:** If you are using a thin client (i.e. Citrix environment) with the Topaz Signature Pad Model: T-S460-B-R, axiUm displays the message, "Signature pad cannot be detected."

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

142546 - Clicking Cancel button on Set axiUm Defaults causes crash

**Module:** Authentication

**Problem:** When you click the Cancel button on the Set axiUm Defaults window, axiUm crashes.

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

142556 - axiUmdCheck.exe complains about unexpected items

**Module:** Database
Problem: axiUmdCheck.exe complains about Standard Items and Oracle Tables.
Solution: Fixed.

142565 - Drug Interactions report needs formatting
Module: Reports

Problem: When you run the Drug Interactions report (by going to Maintenance window - EHR tab - Drug Definitions icon - Drug Definition List window - (Drug Interactions) - Drug Interactions window - (Preview Report)), it is not formatted correctly.
Solution: Fixed formatting issue.

142568 - Closing the Report Editor window causes crash
Module: Patient Info ~ Report Editor window

Problem: When creating new patient labels using axiUms Report Editor (not Microsoft Word) closing the Report Editor window causes axiUm to crash. This problem did not exist in Info Manager using Old Templates.
Solution: Fixed so that in the above scenario, axiUm no longer crashes.

142569 - Old label templates are missing from Labels window
Module: Patient Info ~ Labels window

Problem: When you open the Labels window, the list box displays no templates.
Solution: Fixed so that in the above scenario, axiUm displays any existing templates.

142578 - Topaz LCD 4x5 missing axiUm logo & signature area
Module: Signature

Problem: If you are using Topaz LCD 4x5 signature capture devices (in the Desktop Settings window - Other Settings section, the Signature Capture Device drop-down field displays the Topaz LCD 4.5 option), and you go to the Provider Signature window (in Maintenance window - Office tab - Billing Doctors & Fee Schedules Icon - Billing Doctors / Schedules List window - run a search - (Edit Record) - Billing Doctors / Schedules window - Signature button), the signature pad interface is missing the axiUm logo and signing area until you click the Clear button.
Solution: Fixed so that in the above scenario, the axiUm logo and signing area are shown.
142587 - User Already Logged On warning hidden behind logon dialog

**Module:** Startup

**Problem:** If users are limited to one active axiUm session (in Power Admin - Levels - Users restricted to one active session), when logging on to a second axiUm session, the 'User Already Logged On' warning sometimes appears behind the logon dialog.

**Solution:** Fixed so that this message displays in the forefront.

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142598 - Grammatical changes on Signature Pad window title

**Module:** Signature Pad

**Problem:** Two problems:

- Signature pad interface displays the title Patient Signature for: Treatment Plan consent.
- When signing a payment plan contract, signature pad interface displays the title Patient Signature for: Payment plan contract.

**Solution:** Made the following changes:

- Signature pad interface displays Patient Signature for: Treatment Plan Contract.
- When signing a payment plan contract, signature pad interface displays the title Patient Signature for: Payment Plan Contract. (Note: Also capitalized the title in the Patient Signature for: Consent for Estimated Treatment window and the Patient Signature for: Payment Plan Contract window).

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**Info Manager**

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139465 - Audit User field is blank

**Module:** Info Manager

**Problem:** The Audit User field is blank in the following windows:

- Add Letter window
- Add Letter Template window
- Edit Letter Template window
- Add Label window
- Add Label Template window
- Edit Label Template window

**Solution:** Fixed so that in the above windows, the Audit User field displays the audit user's name.
142112 - Problems printing labels

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

**Problem:** There are two problems when printing labels:

- Problem 1: axiUm prints to a different printer than the one you chose in the Select Printer window.

- Problem 2: The printer you selected above should now be the default label printer, but axiUm saves it as the default letter printer.

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

- Solution 1: axiUm prints to the printer you chose in the Select Printer window.

- Solution 2: axiUm saves the printer you selected as the default label printer.

142505 - Adding condition causes SQL error

**Module:** Info Manager ~ Procedure Fee Guides report

**Problem:** When you run the Procedure Fee Guide report containing a condition on the Proc. Amount. column, axiUm displays an SQL error.

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

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**Maintenance**

137808 - Records disappear from held claims list

**Module:** Maintenance ~ Edit Held Claims window

**Problem:** When a planned claim exists in the Print Held Claims window (in Maintenance window - System tab - Processes icon - Processes window - Print Held button), and a treatment was completed before the initial pre-authorization was printed, axiUm no longer displays the claim in the list view.

**Solution:** Fixed so that when you complete a treatment on a claim before you print the pre-authorization, AND there is at least one treatment on the claim that has not yet been completed, axiUm retains the claim in the Print Held Claims window as a pre-authorization. When you print the pre-authorization, axiUm prints only the incomplete treatments. If all treatments on the pre-authorization have been completed, axiUm removes the claim from the pre-authorization list (the **Claim types** drop-down field displays the Pre-Auths option) and adds it to the claims list (the **Claim types** drop-down field displays the Claims option).
142347 - Merging patient record displays error message

Module: Maintenance ~ Chart Merge Utility window

Problem: When you merge two patient records, and both records contain an EPR form with an ASA score, axiUm displays an error message, “Error merging EPR records, cannot merge charts.”

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

142452 - Maintenance icon not obeying PowerAdmin settings

Module: Maintenance - Insurance tab

Problem: When you go to the PowerAdmin module and turn off the Remittance Advice Remark Codes icon (by going to PowerAdmin window - Main Program section - Maintenance section - Insurance item, and deselect the Remittance Advice Remark Codes checkbox), axiUm still displays this icon in the Maintenance window's Insurance tab.

Solution: Fixed so that in the above scenario, the icon is hidden.

Ortho Manager

142476 - Spell checker not working when editing ortho notes

Module: Ortho Manager ~ Edit Planned Ortho Treatment window

Problem: When you accept the spell check's suggestion, the text remains as originally spelled.

Solution: Fixed so that in the above scenario, axiUm updates the spelling.

Patient Attachment

142581 - Consent Form information is missing

Module: Patient Attachment

Problem: If you use a LCD 4x5 signature pad and sign a consent form, the signature pad interface doesn't show consent name.

Solution: Fixed so that in the above scenario, the consent name is shown.

Patient Card
142576 - Incorrect order of history records

**Module:** Patient Info ~ Dependents History window

**Problem:** axiUm lists the records in incorrect order when they are created on the same date and time. This occurs when you perform tasks seconds apart, creating a history record that is stamped with the same hours and minutes (axiUm does not record seconds).

**Solution:** Fixed so that in the above scenario, axiUm displays these records in the order that the activities occurred.

142602 - Problems with the Labels window

**Module:** Patient Card ~ Labels window

**Problem:** There are two problems if no record is selected and you do the following:

- Clicking the Edit button causes axiUm to crash.
- Clicking the Delete button displays the message, “Are you sure you want to delete the item?”

**Solution:** Fixed so that the Edit and Delete buttons are disabled when no record is selected.

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**PowerAdmin**

142184 - Checkbox not obeying PowerAdmin settings

**Module:** PowerAdmin ~ User Clinical window

**Problem:** When you go to the User Clinical window (in PowerAdmin window - Dialogs branch - MAINTENANCE section - Office section - User Clinical item), and you go to the Can Prescribe section and set the With inherited rights when in ‘Entry on Behalf of’ checkbox to yellow or red, the associated checkbox in axiUm remains enabled.

**Solution:** Fixed so that this checkbox obeys PowerAdmin settings.

142480 - Creating work schedule exception not moving appointments

**Module:** Scheduler

**Problem:** This problem occurs if the provider requires a chair for booking appointments and multiple chairs are allowed. If you book an appointment for this provider, and later you create a work schedule exception that conflicts (see example) with this appointment, axiUm fails to automatically transfer the appointment to another reserved chair for the same provider.

For example, if the original reserve is from 8:00 - 5:00 and the exception is from 1:00 - 5:00 in a different chair, and there was an appointment at 1:00, this appointment would not have been moved because it falls within axium’s hard-coded ‘grace period’ of 30 minutes. The ‘grace period’ allows appointments to extend beyond the end of the reserve by 30 minutes.
**Solution:** Fixed so that in the above scenario, axiUm displays a message indicating that an appointment exists in this chair. When the exception has been added, and the appointments have been moved, you must move the ‘grace time’ appointment to another reserved chair for this provider.

Note: The hard-coded ‘grace time’ or 30 minutes has been removed with this fix and axiUm will now obey the Provider rule ‘Appts Allowed X minutes outside available time’. If this is set to 0, then in the above scenario, the appointment will be moved. If this is set to 30, then a new poweradmin warning (Appointments within ‘Grace Period’ warning) will appear indicating that the appointment(s) will need to be moved manually. Note, that if the grace period is set to 0, no appointment will be allowed to extend beyond a reserve and an error will be given.

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**Rolodex**

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**140410 - Sub-menu is misaligned with its column heading**

**Module:** Rolodex

**Problem:** When Contact Phone is an optional display column that requires scrolling to the right to view, clicking this column heading shows two options (the Search on Contact Phone option and the Search on all phone numbers option), and this is fine. However, these options are misaligned with the column heading.

**Solution:** Fixed so that these options are aligned below the column heading.

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**141180 - Incorrect behavior of inactive appointment codes**

**Module:** Rolodex ~ Patient Recall History window, Patient Recalls window

**Problem:** axiUm displays the incorrect appointment code when all of the following conditions are met:

- The Provider field is blank.
- The Appt. Code drop-down field displays an appointment code that was active at the time you created the recall but is now inactive.
- There is a different recall code with a name (e.g. H5CR) containing the full name of the originally selected recall code (e.g. H5).

**Solution:** Fixed so that in the above scenario, axiUm reflects the recall code selected at the time.

Also, if you try to update the existing recall record or create a new recall record that contains this deactivated appointment code, axiUm displays the Inactive Appointment Warning window with the message, “This recall is using an Inactive appointment Code. Are you sure you want to continue?”

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**Scheduler**
142105 - Selecting different patient during save-to-chart causes crash

**Module:** EHR ~ Treatment Plan window

**Problem:** After saving a large treatment plan record and receiving the patient’s signature, axiUm saves the records to the patient’s chart, and this is fine. However, during the save process, if you go to the Rolodex module and select a different patient, axiUm crashes and the treatment plan record is not saved.

**Solution:** Fixed by disallowing users from taking any further actions until axiUm closes the progress window.

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142467 - Editing records with inactive appointment code shows no warning

**Module:** Scheduler ~ Patient Recalls window

**Problem:** When you edit the details of a recall or preventive care record containing an inactive appointment code, axiUm displays no warning.

**Solution:** Fixed so that in the above scenario, axiUm displays the Inactive Appointment Warning window with the message, “This recall is using an Inactive appointment Code. Are you sure you want to continue?”

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**Transactions**

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142443 - Duplicate note records

**Module:** Transactions - Notes tab

**Problem:** When you manually enter a code rather than selecting one (by clicking (ellipsis) and selecting one from the Patient Note Codes window), axiUm displays duplicate note records in the list view.

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

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142506 - Running the Statement report displays SQL error

**Module:** Transactions ~ Statement report

**Problem:** If you are using DBEngine = 5, and the patient address contains a colon ( : ), running the Statement report displays an SQL error.

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

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**X-Ray**
142503 - Display issue

Module: X-Ray

Problem: XDR interface has a display problem with the clinic name.

Solution: Fixed to display the clinic name correctly.
axiUm Release 5.20.07
Released: February 25, 2014

Dispensary

142333 - Items with 0 life cycle should not be marked for replacement
Module: Dispensary ~ Replace Kit Instrument window

Problem: Items that have exceeded their life cycle should be marked for replacement. When no life cycle has been entered for the item, axiUm incorrectly assumes it needs to be replaced and selects the item for replacement.

Solution: Fixed so that in the above scenario, if items have no life cycle specified (in the Maintenance module), axiUm will never select these.

EHR

140689 - Adding conditions on the odontogram minimizes window
Module: EHR ~ Treatment Plan window

Problem: When you open the Tooth Note/Conditions window and close it, axiUm minimizes the Treatment Plan window behind it.

Solution: Fixed so that in the above scenario, the Treatment Plan window remains displayed.

142278 - Disabled toolbar items causes crash
Module: EHR - Tx Plans tab, Attachments tab

Problem: When you disable a toolbar item that shares the same location as another toolbar item, axiUm crashes. For example, the PowerAdmin module’s EHR Tx Plan window displays both (Make Inactive) and (Re-activate), but in axiUm the associated Tx Plan tab can display only one of these at a time, and if you disable one, opening the associated tab causes axiUm to crash.

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

142592 - Lab drop-down field is empty
Module: EHR ~ Lab Order History window
Problem: When you open the Lab Order History window, axiUm highlights the last record in the list view by default, and this is fine. However, the associated Lab drop-down field is blank.

Solution: Fixed by changing the drop-down field to a field (changed), and this field correctly displays the value entered.

142680 - Approving note deletion displays error message

Module: EHR - Notes tab

Problem: In the Approve Note (deletion) window, axiUm displays an error if there is a blank Custom Field where the custom field setup is required for entry (defined in Maintenance window - Basic tab - Custom Fields icon - Custom Fields window). This scenario is created when notes are auto-added during prescription entry.

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

142746 - Pressing Ctrl twice on yes/no form question causes crash

Module: EHR - Forms tab

Problem: When using Ctrl+R keys to review form answers, if you press Ctrl twice while on a Yes/No question, axiUm crashes.

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

142796 - Custom fields not obeying PowerAdmin settings

Module: EHR - Chart Add tab

Problem: The custom fields in the Details sub-tab are not obeying PowerAdmin settings.

Solution: Fixed so that these fields obey PowerAdmin settings.

142810 - eRx users lost the ability to review medications

Module: EHR - Medications tab

Problem: eRx users lost the ability to perform medication reviews in axiUm.

Solution: Restored the ability to review medications in axiUm.

General

142770 - Defaulting DBEngine to OCCI rather than OO4O

Module: Database
**Problem:** All new installs with newer version of Oracle does not come with the OO4O components anymore, thus resulting in the undesirable error if there's no INI to specify which engine to use. By default, axiUm is set to use OO4O.

**Solution:** Fixed so that if you specify no value for the DBEngine, axiUm defaults to OCCI.

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**142825 - Signature pads not working properly in a Citrix Environment**

**Module:** Signature Pads

**Problem:** If you are running axiUm in a Citrix environment, certain signature pads do not work properly.

**Solution:** Fixed so that signature pads work properly in a Citrix environment.

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**Info Manager**

**140931 - Search containing single quote causes crash**

**Module:** Info Manager ~ Search Data window

**Problem:** If you go to the Info Manager window - Patients tab - Patient List category, open the Column Conditions window for the Pt. Last column or Pt. First column, go to the Value 1-2 fields, and then click (ellipses) to display the Search Data window, and in the Criteria field you enter a patient name containing a single quote (e.g. O'Rourke), clicking the Search button displays a database warning.

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

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**142619 - Incorrect date is exported into Excel**

**Module:** Info Manager ~ Payment Plans report

**Problem:** If the Payment Plans report contains the Plan Next Fee Date column, and you export these records into Excel, the dates are incorrect.

**Solution:** Fixed so that in the above scenario the dates are correct.

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**Maintenance**

**141134 - Drop-down field does not remain disabled**

**Module:** Maintenance ~ Problem Code window
Problem: If you go to the Problem requires Site drop-down field and select the No option, axiUm disables the Problem requires Surface drop-down field, and this is fine. However, if you close the window and re-open it, the Problem requires Surface drop-down field is now enabled.

Solution: Fixed so that in the above scenario, the Problem requires Surface drop-down field remains disabled.

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142601 - Age-specific Coverage Details icon is cut off

Module: Maintenance ~ Linked Coverage Template window

Problem: In the Linked Coverage Template window, sometimes (Age-specific Coverage Details) is cut off. This is a display issue.

Solution: Fixed display issue.

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142705 - Behavior change for country of practice

Module: Maintenance ~ Regional System Settings window

Problem: If your system options is set to US, and you create a practice record, axiUm sets the system options to Canada.

Solution: Fixed so that:

- If there are existing practices defined in the application, axiUm defaults the country of the new practice to the one used in existing practices.
- If there are no existing practices, axiUm defaults the country of the new practice to US.

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142839 - Selecting practice in Print Held Claims window causes SQL error

Module: Maintenance ~ Print Held Claims window

Problem: When you enter search criteria and select a record from the list box, axiUm displays an SQL error.

Solution: Fixed so that in the above scenario, axiUm no longer displays an SQL error.
142541 - Adding letters creates blank letter templates
Module: Patient Attachments ~ Select Patient Letter window
Problem: When you go to the Patient Attachments module and create a new letter, axiUm creates a new letter template.
Solution: Fixed so that in the above scenario, axiUm does not create this template.

139861 - Updating patient status creates extra history records
Module: Patient Card ~ Patient History window
Problem: Updating a patient's account status creates extra history records.
Solution: Fixed to prevent axiUm from creating extra history records.

142574 - Changing policy subscriber changes employers
Module: Patient Card - Insurance tab
Problem: Sometimes, when you modify a policy and the patient had another multi-subscriber policy and a primary employer on file, axiUm prompts you to update all subscribers on the plan and populates the Employer field, which is incorrect.
Solution: Fixed so that when you add new policies, axiUm defaults the Employer field only when appropriate.

142684 - Need to change behavior of the Send Statements checkbox
Module: Patient Card
Problem: Would like to be able to turn off statements for non-patient guarantors so they are excluded from a Guarantor Statements run.
Solution: A Send Statements checkbox (new) has been added to the Guarantor tab's Guarantor Information section.
This checkbox is selected by default and is enabled when the selected guarantor is a non-patient and disabled if the guarantor is a patient. Deselecting this checkbox will exclude this guarantor when generating Info Manager Guarantor Statements. For patients, this checkbox can be modified in the Codes tab.

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**Patient Sign-In**

142706 - Cannot run Kiosk with Oracle client 11.2.0.3+

**Module:** Patient Sign-In

**Issue:** You cannot run the Patient Sign-In application (i.e. kiosk) on Oracle client 11.2.0.3 or higher.

**Enhancement:** Fixed.

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**Personal Planner**

142756 - Forms on 32-bit operating system causes crash

**Module:** Personal Planner ~ User Forms window

**Problem:** If you are using a 32-bit operating system, and in the User Forms window you answer some questions, closing this window causes axiUm to crash.

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

142610 - Searching on contact phone not working properly

Module: Rolodex

Problem: Sometimes, when two phone number columns are displayed, and you run a search on all phone numbers, aXiUm displays no search results.

Solution: Fixed so that in the above scenario, aXiUm displays matching search results.

142764 - Problem searching guarantor

Module: Rolodex

Problem: When you have the following setup:

- In Rolodex Options, turn Display Age/Sex in List ON.
- Add Guarantor Name as an optional column.
- Add Guarantor First as an optional column.

Then when you close and re-open the Rolodex module:

- Problem 1: When you run a search, the Guar Last column displays (U0) instead of the sex/age.
- Problem 2: When you run a search, the Guar. Name column displays “Last,”.
- Problem 3: When you enter a guarantor’s last name in search field and click Guar. Name column, aXiUm returns no search results (this works if name entered in all caps).
- Problem 4: When you enter a guarantor’s first name in the search field and you click Guar. Name column, aXiUm returns no search results.

Solution: Fixed so that in the above scenarios:

- Solution 1: Guar.Name column displays the sex/age.
- Solution 2: Guar. Name displays Last, First.
- Solution 3: Search results are displayed.
- Solution 4: Search results are displayed.
Scheduler

138908 - List pop-up does not close
Module: Scheduler - Pending tab
Problem: This problem occurs if you have axiUm set up to manually display list pop-ups (in the List Popup Options (Appointments) window, the Manually by pressing the spacebar option is selected). Then if you go to the Pending tab and you highlight a record, pressing the spacebar displays the list pop-up, and this is fine. However, if you click on a different tab (e.g. Chair tab), the list pop-up remains displayed.
Solution: Fixed so that in the above scenario, axiUm closes the list pop-up.

142607 - Appointments shift to the chair on the right
Module: Scheduler ~ Work Schedule Exception window
Problem: Sometimes, when you edit the Work Schedule Exception window, axiUm shifts the appointment chair.
Solution: Fixed so that in the above scenario, the appointment chair remains unchanged.

142758 - Warning fails to display
Module: Scheduler ~ Provider Working Scheduler window
Problem: When you modify the Provider Schedule detail where a provider has a booked appointment, axiUm fails to display the Provider Working Scheduler window.
Solution: Fixed so that in the above scenario, axiUm displays the message, “Appointment(s) found, can't delete/change schedule record.”

142840 - Provider Schedule Detail window causes SQL error
Module: Scheduler ~ Provider Schedule Detail window
Problem: When and select a chair, axiUm displays an SQL error.
Solution: Fixed so that in the above scenario, axiUm no longer displays an SQL error.

Transactions

142711 - Custom field label removes text instead of truncating them
Module: Transactions - Ins Pmt tab
**Problem:** When a custom field label contains long text with single words (e.g. Department) truncates the label (i.e. Departme), and this is fine. However, multiple words (e.g. Dept Name), shows only the first word (i.e. Dept).

**Solution:** Fixed so that in the above scenario, axiUm displays an ellipsis after the first word (i.e. Departmen...).
axiUm Release 5.20.08
Released: April 2, 2014

EHR

142824 - Rcopia® integration now includes patient's middle name

Module: EHR

Problem: Need to send patient's middle name to eRx to ensure that correct drug formulary information is found for patients with the same first/last name.

Solution: When eRx is launched, axiUm will include the patient's middle name in the information sent.

142892 - Lab order with many treatments causes crash

Module: EHR ~ Add Lab Order window

Problem: When you create a lab order that contains over 30 treatments, axiUm crashes.

Solution: Fixed so that you can create a large number of treatments on the same lab order.

142894 - Template note answers are not saved

Module: EHR - Notes tab

Problem: In certain cases, when the internal ID of a template note is the same as the internal ID of a form, axiUm fails to display the note answers during the approval process.

Solution: Fixed.

142943 - Issues with diagnoses

Module: EHR ~ In Process Treatment Review window, Complete Treatment Review window

Problem: This problem occurs if you go to the Tx History tab and select either the In Process Tx Visit right-click option or the Complete Treatments right-click option. Then if you select multiple treatments with different diagnosis codes, axiUm fails to display the correct diagnosis codes in the associated window (i.e. the In Process Treatment Review window or the Complete Treatment Review window) when individual lines were selected.

Solution: Fixed so that in the above scenario, axiUm displays the correct diagnosis codes for treatment lines (if diagnosis codes differ between treatments).
142944 - Allow treatments to be updated without changing diagnosis

**Module:** EHR - Tx History tab

**Problem:** This problem occurs if the System Options window - System Options section - Use Clinical Diagnosis Codes drop-down field displays the Mandatory option. Then when you mark multiple treatments as In Process or Complete (by multi-selecting records in the EHR window - Tx History tab), axiUm displays the error message, “Diagnosis is required.” This prevents you from modifying multiple treatment lines in the In Process Treatment Review or the Complete Treatment Review window.

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

142946 - Updating treatment steps delete diagnosis codes

**Module:** EHR - Tx History tab

**Problem:** In version 5.20, we introduced the ability to associate multiple diagnoses to a treatment. These diagnoses were not always being maintained on the treatment when a change to the treatment resulted in a strike-out record plus a new treatment record. For example, editing or completing step treatments, re-doing a step treatment, assigning phases and sequences, and follow-up Medicaid visits.

**Solution:** Fixed so that in the above scenario, axiUm maintains the diagnosis codes associated to the treatments in all cases.

**Maintenance**

142917 - Problems with insurance company setup

**Module:** Maintenance ~ Insurance Company window

**Problem:** When you select the new HCFA2012 claim form for pre-authorizations, axiUm displays incorrect error in the Insurance Company window.

**Solution:** Fixed to not display the incorrect error.

**Scheduler**

142951 - Incorrect time blocks

**Module:** Scheduler - Active tab

**Problem:** When you search for open appointment times by selecting a planned or requested appointment record in the Patient Appointments window or the Family Appointments window, go to the Appointment Expert window (by clicking the Sch. w/Expert button), run a search, and then display the Appointment Expert in preview mode (by clicking the Preview button), the Active tab displays incorrect clinic times and highlights incorrect times for the selected appointment block.

**Solution:** Display issue has been fixed.
143134 - SQL error on open of Operatory Monitor if using Oracle server 10g

Module: Scheduler ~ Operatory Monitor window

Problem: If using Oracle server 10g, there is a SQL error on open of the Operatory Monitor window.

Solution: Fixed so that in the above scenario, Operatory Monitor opens successfully.

Transactions

142830 - Cannot default facility on planned treatment

Module: Transactions - Treatment tab

Problem: When treatments are accepted in the Treatment Planning module, the default facility is missing on the claim.

Solution: Planning treatments through the Treatment Planning module now populates the treatments with the default facility (practice default or workstation default) as is done when the treatment is planned from the Chart Add tab.
EDI Claims

143064 - Patient eligibility status is misleading
Module: EDI Claims
Problem: When running patient eligibility checks, axiUm displays one of three statuses: Error, Rejection, or Eligible. The problem is that sometimes (most often with Medicaid insurance), the response returns with the status Eligible because the patient is currently a subscriber of the policy but they have limited coverage or an inactive coverage. Need a way to direct users to click the Details button to view the detailed information returned.
Solution: Fixed so that when you receive a response that is not flagged as either Error or Rejected, axiUm displays the status “Eligibility Received - check details”.

EHR

134289 - Display issue with Treatment Plan window
Module: EHR ~ Treatment Plan window
Problem: When you go to the treatment option tabs and enter long names, axiUm runs out of display space, causing some tabs to become hidden and preventing you from adding new treatment plan options.
Solution: Fixed this display issue. Also, axiUm now limits you to 10 treatment plan options per treatment plan.

140851 - Missing warnings when editing problem records
Module: EHR ~ Treatment Plan window
Problem: When editing problems in a treatment plan or from Update Problems window, axiUm fails to display the following messages when needed:

- Tx Plan Similar Problem Warning window:
  The same problem already exists with site or surface specified. Are you sure you want to continue?

- Tx Plan Duplicate Problem Warning window:
An identical, unresolved problem already exists for this patient. Are you sure you want to continue?

- messagebox:
  Only date, Status and the Note can be changed if the problem is approved.

**Solution:** Fixed so that the above messages appear when needed.

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### 143226 - Speed issues with EPR Forms that update Medications area of Alerts tab

**Module:** EHR - Forms tab

**Problem:** EHR Forms has poor performance when moving between form questions and pages because axiUm tries to refresh the Alerts area to update the Medications area that may have been updated on systems that use Form data to collect Medications information.

**Solution:** This refresh has been optimized to update the display faster and allow for quicker response time within the Forms tab.

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### 143227 - Speed issues with EPR forms

**Module:** EHR - Forms tab

**Problem:** EHR Forms had some general poor performance when moving between form questions and pages.

**Solution:** The SQL calls in this area have been optimized to improve response time within the Forms tab.

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### Maintenance

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### 142879 - Secondary insurance is not being batched

**Module:** Maintenance ~ Auto Match UnSubmitted Claims window

**Problem:** If you auto-batch claims with the Create claims for secondary Insurers checkbox selected, axiUm fails to batch some treatments that are flagged as not submitted for secondary insurance. This occurs when there is a $0 treatment on a claim that has been rebilled. Currently, this would only occur for clients that bill visit fees as a zero-dollar treatment line. The submission of $0 treatments on claims will increase with the introduction of support for $0 G-Codes (see enhancement 142851).

**Solution:** Fixed so that in the above scenario, the auto-claim processing submits claims for the secondary insurance.
Messenger

142916 - Printing causes crash
Module: Messenger
Problem: When you try printing a message (either sent or received), axiUm crashes.
Solution: Fixed so that when you select to print a message, axiUm no longer crashes.

143153 - Cannot delete messages
Module: Messenger
Problem: When you receive a high priority message and you log onto axiUm, the application automatically opens the Messenger module and also displays the View “Received” Message window (containing the message), and this is fine. However, if you click the Delete button, axiUm retains this record in your Inbox as an unread message (i.e. bold text).
Solution: Fixed so that in the above scenario, axiUm deletes the message from your Inbox.

Patient Card

142574 - Changing policy subscriber changes employers
Module: Patient Card - Insurance tab
Problem: Sometimes, when you modify a policy and the patient had another multi-subscriber policy and a primary employer on file, axiUm prompts you to update all subscribers on the plan and populates the Employer field, which is incorrect.
Solution: Fixed so that when you add new policies, axiUm defaults the Employer field only when appropriate.

Scheduler

142141 - Right-click option not obeying PowerAdmin settings
Module: Scheduler ~ Rolodex (Select Patient) window
Problem: When you disable the List All Patient Types right-click option (by going to PowerAdmin window - Menus branch - Scheduler section - Scheduler Rolodex item, and deselecting the List All Patient Types checkbox), this right-click option remains enabled.
Solution: Fixed so that in the above scenario, the right-click option is disabled.
143202 - Cannot reassign appointments through Provider Work Schedule

**Module:** Scheduler ~ Provider Schedule Detail window  
**Problem:** A fix made for 142758 in version 5.20.07 incorrectly prevented chair assignment changes in Provider Work Schedules when there were scheduled appointments in the original chairs.  
**Solution:** This change has been reversed so that the transfer of appointments will work again when there are enough chairs in the new setup to accommodate the existing appointments.
axiUm Release 5.20.10
 Released: August 27, 2014

EHR

140535 - Unnecessary message
Module: EHR - Chart Add tab
Problem: When you manually enter (without using intellisense) a different diagnosis than what is displayed, axiUm displays the message, “Are you sure you want to delete the selected item(s)?”
Solution: Fixed so that in the above scenario, axiUm displays no messages.

142860 - No prompt on approval to delete alerts/needs/problems/allergies based on patient answers to iForm questions
Module: EHR ~ Form Approval
Problem: Some form answers will prompt or auto-add alerts to a patient's record. When these answers are updated in PatientAccess to different values and then later approved in axiUm, axiUm should ask the user if the alert should be removed.
Solution: Now the user will be asked if they would like to remove the alert. This applies also to Medical Problems and Allergies in version 6.00.00 and higher.

142893 - EHR | Alerts: No Current Medications is not displayed if review is done when no medications
Module: EHR
Problem: When doing a Medication Review for a patient that has no medications on file, the review line displays correctly in the Medications list but the Medications section of the Alerts tab is not refreshed to display the 'No current medications' review line.
Solution: Now the 'No current medications' review line displays in both areas.

143021 - Adding subquestions to an already answered question should be allowed
Module: Maintenance ~ EPR Form Setup
Problem: When updating a Form Setup to 'Prompt for sub-questions' when the main Yes/No question has been answered a certain way, axiUm incorrectly gives an error to the user if the
main question has already been answered on a form for a patient. This should be allowed as the change doesn't affect the existing answers to the main question.

**Solution:** The error will now only display if there were previously answered sub-questions and the user is changing the setting for 'Prompt for sub-questions'.

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**143290 - Default discipline sometimes not populated in Tx Planning**

**Module:** EHR ~ Treatment Plan window  
**Problem:** When adding a procedure code to the Tx Option from the Select Procedure dlg, default discipline is not populating.  
**Solution:** Fixed.

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**143372 - EHR Alerts - Medications not always refreshing when new medication added**

**Module:** EHR ~ Alerts tab  
**Problem:** A Medications Review for a patient with No Current Medications doesn't display immediately in the Alerts tab.  
**Solution:** Fixed.

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**143503 - Truncated ADA Codes in Chart Add & Tx Planning Module**

**Module:** EHR  
**Issue:** Intellisense doesn't shows complete procedure code if it is of more than five digits.  
**Solution:** Fixed.

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**143551 - Diagnoses not populating when multiple diagnoses with same description**

**Module:** EHR - Chart Add tab  
**Issue:** axiUm can have multiple diagnosis codes containing the same description. Sometimes, if you go to the Diagnosis tab and add one of these diagnosis codes, the Diagnosis field does not display the selected diagnosis.  
**Solution:** Fixed.

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**143716 - Missing records in EPR forms**

**Module:** EHR - Forms tab  
**Issue:** When you preview an EHR form, some records are missing.
**Solution**: Fixed to display all records.

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### General

**142875 - Changing Default Practice during logon does not update title bar display**

*Module*: Login  

*Problem*: When changing the Default Practice during login the title bar still displays the previous practice even though the practice is saved correctly.  

*Solution*: The title bar now displays the correct practice.

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**142934 - Auto switch the DBEngine should be based on oracle client version**

*Module*: General

*Problem*: When no DBEngine is specified in axium.ini, the default is set to 5 (OCCI), which causes problems for those using an Oracle 10 client. When Oracle 10 is detected, the database engine should default to 3 (0040).

*Solution*: Fixed.

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### Info Manager

**143031 - Insurance Aged Balances not processing all selected insurance companies**

*Module*: Info Manager ~ Insurance Aged Balances Report, Include Insurance Companies window

*Problem*: When selecting the maximum allowed 500 insurance companies, axium is only including approximately 250 insurance companies in the report.

*Solution*: Fixed to include all selected insurance companies.

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**143322 - Can't add Other Provider fields to Appointment Procedures or Wait List reports**

*Module*: Info Manager ~ Appointment tab

*Problem*: axiUm crashes when fields from the Other Providers table are added to the Appointment Procedures or Wait List reports.
**Solution:** Fixed.

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**143523 - SQL error when adding User Auto Spell Check Clinical Notes**

**Module:** Info Manager

**Problem:** When adding "User Details | User Auto Spell Check Clinical Notes" field to some reports, SQL error was returned.

**Solution:** Fixed.

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**143688 - Database Tables Access Log report includes invalid records**

**Module:** Info Manager ~ Database Tables Access Log report

**Issue:** When you run the Database Tables Access Log report, axiUm includes invalid records.

**Solution:** Fixed to exclude invalid records.

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**Lab Tracking**

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**143199 - Lab order not displaying**

**Module:** Lab Tracking

**Issue:** In some cases, lab orders that exist in the EHR module do not display in the Lab Tracking window.

**Solution:** Fixed so that axiUm displays these lab orders.

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**143270 - Lab Tracking Module: All LABORDER records have the same AUDIT number**

**Module:** Lab Tracking

**Problem:** When a Lab Order is updated, the new audit id was stamped on all existing lab order records. However, the History records contain the correct audit id, so all audit information displays correctly in the Lab Order History dialog.

**Solution:** Fixed to update the Audit Id correctly when a Lab Order is modified. The Audit Ids on existing records have been corrected using the audit id of the last history record.
142727 - Dental Problem Codes can't be re-added after deletion
Module: Maintenance ~ Dental Problem List
Problem: Unable to add a Dental Problem with the same Code or Description as a deleted record.
Solution: Fixed.

143027 - Quick List Definitions - Up/Down arrow button issue
Module: Maintenance ~ EHR Display Options ~ Quick List Definitions
Problem: Using the Up and Down buttons doesn't always move the selected row appropriately.
Solution: Fixed.

143310 - axiUm crashes when attempting to update Schedule Until date for all providers
Module: Maintenance
Problem: axiUm crashes on an attempt to update the "Schedule Until" field for all users of the same Provider Type and Current Year when Provider ID is 9 characters long.
Solution: Fixed.

143364 - Unknown exception (Crash) occurs when modifying Conditions or Materials
Module: Maintenance ~ Procedure codes
Problem: Modifying an existing Condition or Material causes a crash.
Solution: Fixed.

143420 - Rider coverage is not copied when a benefit plan is renewed
Module: Maintenance ~ Insurance tab
Issue: Rider coverage is not copied when a benefit plan is renewed even though other coverage is copied.
Solution: Fixed.
143428 - Problem List: SQL error when Problem Description contains single quotes
Module: Maintenance - EHR tab
Issue: When adding a new dental problem code that includes a single quote in the description, SQL error was generated.
Solution: Fixed.

143467 - Viewing details of a Benefit Plan Rider crashes axiUm
Module: Maintenance ~ Benefit Plan Riders
Issue: When editing a benefit plan with a Rider template, using right click Show Details to view the Rider details will crash when a coverage template is selected.
Solution: Fixed.

143533 - Duplicate patient summary codes cause chart merging to fail
Module: Maintenance ~ Chart Merge Utility window
Problem: If you merge two patient charts containing the same patient summary codes, axiUm displays the message, “Error merging records, please call support” and the merge fails.
Solution: Fixed so that in the above scenario, axiUm successfully processes the chart merge.

143693 - Opening the Database Auditing window causes crash
Module: Maintenance ~ Database Auditing window
Problem: When you open the Database Auditing window, axiUm crashes.
Solution: Fixed.

Patient Assignments

143336 - Pt Assignment Manager missing some tables/fields
Module: Patient Assignments
Problem: Patient Assignments missing some tables for Patient Need and Planned Tx reports. These tables were added to Info Manager but were missed for Patient Assignments.
Solution: Fixed.
143447 - Pt Assignments: Detail/Planned Tx report crashes when Station table fields added

Module: Patient Assignments

Problem: axiUm crashes when STATION table fields are added to the Planned Tx report.

Solution: Fixed.

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Patient Card

143685 - Navigation issue

Module: Patient Card

Issue: When the Patient Card window is set to yellow (i.e. read-only) in the Power Admin module, clicking on these read-only elements still opens the Patient Info windows.

Solution: The security is set by groups on the Patient Card window. If the group is set to red or yellow, it is inaccessible. If one of the controls in the group is green (including labels), you can click in the group, and this displays the corresponding tab in the Patient Info window.

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PowerAdmin

143522 - Log On as User feature not obeying PowerAdmin settings

Module: PowerAdmin

Problem: The security settings do not work with the Log On As User feature.

Solution: When you logon as an administrator and use the Log on as User feature (using a level that with Default Rights = No Access), axiUm correctly applies the security level.

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Rolodex

139710 - SQL error when searching in rolodex using Guarantor fields

Module: Rolodex

Problem: Rolodex searching occasionally gives an SQL error when Guarantor First or Last name are optional display columns.

Solution: Fixed.
143255 - Patient History not displaying email address changes correctly
Module: Rolodex
Problem: When viewing the Patient History report for a history record written due and an email address being added on the patient record, the email address does not display.
Solution: Fixed.

143733 - Sorting by column heading causes SQL error
Module: Rolodex
Issue: When you click on an additional optional column to sort records, axiUm displays an SQL error.
Solution: Fixed so that in the above scenario, axiUm no longer displays an SQL error.

143741 - Patient Dependents wording improvement
Module: Rolodex ~ Dependents window
Issue: Need to improve the wording of the static text displayed in the Dependents window. Currently, it displays:

Note:  
(P) indicates the appl. limit balance is on Patient;  
(P+D): implies balance is on Patient plus deductible

Solution: Fixed so that the static text on the Dependents window (changed) displays the following:

Note:  
(P): Limit balance is for a Patient Maximum;  
(P+D): Limit balance is for Patient Maximum plus Deductible

Scheduler

142522 - Expert should not give results for providers other than primary hygienist
Module: Scheduler ~ Appointment Expert
Issue: Expert should not give results for other hygienists when it is expected to give an error when search is performed by leaving Provider field blank
Solution: Fixed.
142891 - Chairs are not correctly sorted by priority in Operatory Monitor

**Module:** Operatory Monitor

**Problem:** In Operatory Monitor, when sorting by Priority chairs with low priority statuses are not sorted above chairs with no status.

**Solution:** Chairs with no status are now sorted below chairs with low priority status.

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142897 - Sort order not retained after refresh in Text Mode of Operatory Monitor

**Module:** Scheduler ~ Operatory Monitor

**Problem:** In the Text Mode view of Operatory Monitor, column sorting is not retained after the display is refreshed.

**Solution:** Fixed.

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142949 - Op Monitor: non-session based notification state records from previous dates don't sort correctly

**Module:** Scheduler ~ Operatory Monitor

**Problem:** If a chair is stamped with a non-session based clinical notification state from a previous date, the text mode view does not sort it correctly above statuses of the same priority for today when clicking on the Provider Status column.

**Solution:** Fixed.

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143348 - Appointment Expert doesn't take session time into consideration from Appt Requests

**Module:** Scheduler ~ Appointment Expert

**Problem:** When scheduling an Appointment Request with a Session specified, Appointment Expert should not display results for open time prior to the start of the requested session.

**Solution:** When a Session is entered on an Appointment Request, Appointment Expert will default the Time Range for the search to begin at the start of the session.

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143376 - Unable to delete a non-clinic time after a re-assignment of appointments

**Module:** Scheduler
Problem: When re-assigning appointments in the Active tab to another provider in another chair, you are prompted if you'd like to delete the reserve(s) from the originating chair. If you answer No and the chair had a clinic time exception, there is no way to delete the clinic time exception.

Solution: The user is no longer prevented from deleting the clinic time exception in this scenario.

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Transactions

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140837 - Ability to set ADA 2006 claim form’s Box 50 to blank for corporations

Module: Transactions ~ claim forms

Problem: On ADA claim forms, if the billing entity is a corporation, Box 50 should be left blank.

Solution: There is a new station option. In Station Options window - Maintenance branch - Claim section - PrintLicenseNumber item (new) to indicate whether or not to print the license number in Box 50 of the ADA claim form. The default is No.

Note: A different, long term solution will be considered for newer axiUm releases. This is a 4.83 solution only to provide a resolution to this issue in a patch release in a timely fashion. When upgrading to a newer axiUm release, an alternate setup may be required to maintain this behavior.

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143280 - Adding ADA code after a CPT code to a dental claim in Transactions crashes

Module: Transactions

Problem: Adding a dental procedure code after a medical procedure code on the same DENTAL claim causes a crash in the Transactions module.

Solution: Fixed.

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143527 - HCFA 02/12 form needs flexible date formatting

Module: Transactions ~ claim forms

Problem: HCFA 02/12 claims forms are being rejected by some insurance companies because they require the date format in fields 11b, 14, 16, 18 and 19 to match the date format of field 24a. Need the HCFA 02/12 form to take the Station Option setting 'HCFAUse4DigitYear' into consideration when printing.

Solution: This setting now affects the format of date fields on the HCFA 02/12 form. To change the date format of fields 11b, 14, 16, 18 and 19 to a 2 digit year, use value = 2.
142962 - The "Problem list" pop up list is being cut off

*Module:* Tx Planning

**Problem:** When linking diagnosis to problems in Treatment Planning, if the patient has more than about 15 problems on record, the pop up selection list does not display the entire list of problems.

**Solution:** A vertical scrollbar is added to problem list popup so that user can scroll up/down in list and select desired problem.

143000 - Tx Plan signature not always captured when multiple workstations are accessing the same Tx Plan

*Module:* Tx Planning

**Problem:** When the same treatment plan is accessed from two different machines, if one machine cancels the signature capture dialog before the other one completes the signature capture, the signature is not saved correctly on the Treatment Plan contract.

**Solution:** Fixed.

143256 - Tx Plan "New Option" can be disabled from the right click but the "+(New Option)" tab is still enabled

*Module:* Tx Planning

**Problem:** Would like to be able to disable the "+(New Option)" tab to restrict users to one only Tx Option.

**Solution:** Now, when right click option 'New Treatment' is disabled in Power Admin (Menus | Tx Planning | Option Treatments | New Treatment), user will not have access to add additional options by clicking on "+(New Option)".

143309 - Select Procedures dialog is blank when PowerAdmin role's default rights are No Access

*Module:* Tx Planning

**Problem:** In Tx Planning, when using the Select Procedures dialog to select a procedure code, the dialog displays blank when the logged in user's PowerAdmin role's default rights set to "No Access".

**Solution:** Fixed.