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About this Manual

This axiUm Reference Manual will help you start using axiUm. It shows you how to:

• Follow document conventions.
• Familiarize yourself with the Overdue Patients windows.
• Use the fields and options in various Overdue Patients module windows.

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

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

Document Conventions

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

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

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

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="pencil.png" alt="Pencil" /></td>
<td>Notes and helpful information. For example, things that will become apparent later on in the procedure.</td>
</tr>
<tr>
<td><img src="exclamation.png" alt="Exclamation" /></td>
<td>Important information or steps you must take. For example, if you do not complete this step you may be unable to complete a task later on.</td>
</tr>
<tr>
<td><img src="lightbulb.png" alt="Lightbulb" /></td>
<td>Tips, ideas, and alternative methods. For example, using shortcuts, applying previously learned tools, or suggesting different uses.</td>
</tr>
<tr>
<td><img src="warning.png" alt="Warning" /></td>
<td>Warnings before taking action. For example, precautions against irreversible actions, or actions that require a lot of work to undo.</td>
</tr>
</tbody>
</table>
This chapter defines all the interactive screen elements in the Overdue Patients module, such as:

- fields
- drop-down fields
- check boxes
- options
- list boxes
- list views

All the screen names that appear in the Overdue Patients module are listed in alphabetical order. Screens that are accessible through the Overdue Patients module may belong under a different module and are not shown in this document. For these field definitions, refer to another axiUm Reference Manual.

1 Overdue Extensions Window

You can access this window by clicking the Extend button in the Overdue Patients window. For information on the Overdue Patients window, see *Overdue Patients Window* on page 7.

Use this window to apply overdue extensions for the overdue patient highlighted in the Overdue Patients window.
OVERDUE EXTENSIONS WINDOW

Clear Data  Clicking this icon clears the fields. By clearing the fields, axiUm allows you to enter a new record.

Add a new Record  Clicking this icon adds the new overdue extension you entered, and displays it in the list view.

Modify Record  Clicking this icon saves any modifications you made to the item selected from the list view.

Delete Record  Clicking this icon permanently deletes the item selected from the list view.
1.1 Overdue Reason Section

OVERDUE EXTENSIONS WINDOW - OVERDUE REASON SECTION

Patient
This disabled field indicates the last name and first name of the patient highlighted in the Overdue Patients window. For information on the Overdue Patients window, see Overdue Patients Window on page 7.

Provider
This disabled field indicates the last name and first name of the provider assigned to this patient.

[list view]
This disabled list view indicates the overdue reason and the length of time it has been overdue.

1.2 Overdue Extension Section

OVERDUE EXTENSIONS WINDOW - OVERDUE EXTENSION SECTION

Date
This field indicates the date on which the extension being granted starts.

Extend Until
This field indicates the date on which the extension terminates.

Extension of
This field indicates the number of days / months for which to grant the extension.

The system will calculate this value based on the date specified in the Extend Until field. This field is used in conjunction with the Period field.

Period
This drop-down field indicates the length of time before a condition becomes overdue again, and displays the following options:

- Calendar Days
- Clinical Days
- Calendar Months

This field is used in conjunction with the Extension Of field.
**OVERDUE EXTENSIONS WINDOW - OVERDUE EXTENSION SECTION**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Reason</strong></td>
<td>This field indicates the reason for the overdue extension.</td>
</tr>
<tr>
<td></td>
<td>Clicking ‼️ (ellipsis) opens the <em>Overdue Extension Reasons</em> window to select from. For information on the <em>Overdue Extension Reasons</em> window, refer to the axiUm Reference Manual for Maintenance and see <em>Overdue Extension Reasons Window</em> on page 617.</td>
</tr>
<tr>
<td><strong>Apply to all</strong></td>
<td>This checkbox, if selected, indicates this extension applies to all overdue conditions that this patient has on record.</td>
</tr>
<tr>
<td><strong>Overdue Conditions for this Patient</strong></td>
<td></td>
</tr>
</tbody>
</table>

2 **Overdue Extensions (General) Window**

You can access this window by clicking the General Ext. button in the Overdue Patients window. For information on the Overdue Patients window, see *Overdue Patients Window* on page 7.

Use this window to apply overdue extensions for all overdue conditions for a specific patient.

A Messenger Module message can be automatically sent to selected recipients when an extension is granted, alerting them of the extension.
### Overdue Extensions (General) Window

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patient</td>
<td>This disabled field indicates the last name and first name of the currently selected patient in axiUm.</td>
</tr>
<tr>
<td></td>
<td>Clicking (ellipsis) opens the Rolodex (Select Patient) window. For information on the Rolodex (Select Patient) window, refer to the axiUm Reference Manual for Scheduler and see Rolodex (Select Patient) Window on page 148.</td>
</tr>
<tr>
<td>Date</td>
<td>This field indicates the date on which the extension being granted starts.</td>
</tr>
<tr>
<td>Extend Until</td>
<td>This field indicates the date on which the extension terminates.</td>
</tr>
<tr>
<td>Extension Of</td>
<td>This field indicates the number of days / months for which to grant the extension.</td>
</tr>
<tr>
<td></td>
<td>The system will calculate this value based on the date specified in the Extend Until field.</td>
</tr>
<tr>
<td></td>
<td>This field is used in conjunction with the Period field.</td>
</tr>
<tr>
<td>Period</td>
<td>This drop-down field indicates the length of time before a condition becomes overdue again, and displays the following options:</td>
</tr>
<tr>
<td></td>
<td>• Calendar Days</td>
</tr>
<tr>
<td></td>
<td>• Clinical Days</td>
</tr>
<tr>
<td></td>
<td>• Calendar Months</td>
</tr>
<tr>
<td></td>
<td>This field is used in conjunction with the Extension Of field.</td>
</tr>
<tr>
<td>Reason</td>
<td>This field indicates the reason for the overdue extension.</td>
</tr>
<tr>
<td></td>
<td>Clicking (ellipsis) opens the Overdue Extension Reasons window to select from. For information on the Overdue Extension Reasons window, refer to the axiUm Reference Manual for Maintenance and see Overdue Extension Reasons Window on page 617.</td>
</tr>
<tr>
<td>Apply to all</td>
<td>This disabled checkbox, if selected, indicates this extension applies to all overdue conditions that this patient has on record. axiUm automatically selects this when you are in this window because the overdue extensions indicated here apply to all overdue conditions that this patient has on record.</td>
</tr>
<tr>
<td>Overdue Conditions for this Patient</td>
<td></td>
</tr>
<tr>
<td>Clear Data</td>
<td>Clicking this icon clears the fields. By clearing the fields, axiUm allows you to enter a new record.</td>
</tr>
<tr>
<td>Add a new Record</td>
<td>Clicking this icon adds the new overdue extension you entered, and displays it in the list view.</td>
</tr>
<tr>
<td>Modify Record</td>
<td>Clicking this icon saves any modifications you made to the item selected from the list view.</td>
</tr>
<tr>
<td>Delete Record</td>
<td>Clicking this icon permanently deletes the item selected from the list view.</td>
</tr>
</tbody>
</table>
3 Overdue Extensions (for Multiple Patients) Window

You can access this window by highlighting multiple items in the Overdue Patients window’s list view and clicking the Extend button. You can multi-select different patients, the same patient with multiple overdue conditions, or a combination of both.

Use this window to grant extensions for multiple records.

A Messenger Module message can be automatically sent to selected recipients when an extension is granted, alerting them of the extension.

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**OVERDUE EXTENSIONS (FOR MULTIPLE PATIENTS) WINDOW**

- **Date**: The date on which the extension is being granted.
- **Extend Until**: The date on which the extension terminates.
- **Extension Of**: Used in conjunction with Period to indicate the number of days / months to grant the extension for. The system will calculate this value based on the date specified in the Extend Until field.
- **Period**: Used in conjunction with the Extension Of field to indicate the number of days / months to grant the extension for. Set to Calendar Days, Clinical Days, or Calendar Months.
- **Period**: This drop-down field indicates the length of time before a condition becomes overdue again. This field is used in conjunction with the Extension Of field and displays the following options:
  - Calendar Days
  - Clinical Days
  - Calendar Months
- **Reason**: Clicking (ellipsis) opens the Overdue Extension Reasons window to select from. For information on the Overdue Extension Reasons window, refer to the axiUm Reference Manual for Maintenance and see Overdue Extension Reasons Window on page 617.
- **Apply to all Overdue Conditions for this Patient**: This disabled checkbox, if selected, indicates this extension applies to all overdue conditions that this patient has on record. axiUm automatically selects this when you are in this window because the overdue extensions indicated here apply to all overdue conditions these patients have on record.
- **OK**: Clicking this button saves the entries and closes the Overdue Extensions (for Multiple Patients) window.
OVERDUE EXTENSIONS (FOR MULTIPLE PATIENTS) WINDOW

Overdue Patients Window

This is the main Overdue Patients module window.

You can access this window by:

- Clicking (Overdue Patients) from the axiUm main screen icons.
- Clicking the Overdue Patients option from the Actions menu.
- Clicking from the Desktop.

Use this window to search for overdue patients.
OVERDUE PATIENTS WINDOW

**Group**
This search drop-down field indicates that the search list will only contain overdue patients for the specified group. The options in this drop-down field are defined in the Provider Group Codes window. For information on the Provider Group Codes window, refer to the axiUm Reference Manual for Maintenance and see Provider Group Codes Window on page 486.

**Reason**
This search drop-down field indicates the reason for this patient becoming overdue. The options in the drop-down field are provided by axiUm and can be modified in the Overdue Patient Conditions window. You can add more options, change the given options, or delete them using the Overdue Patient Conditions window. For information on the Overdue Patient Conditions window, refer to the axiUm Reference Manual for Maintenance and see Overdue Patient Conditions Window on page 607.

If you select the All option, axiUm searches for all overdue reasons.

**Provider**
This search field indicates that the search list will only include overdue patient records that are assigned to the specified provider.

Clicking  (ellipsis) opens the Providers List window to select from. For information on the Providers List window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Providers List Window on page 142.

**Pt Status**
This search field indicates that the search list will only contain overdue patients of the specified status.

Clicking  (ellipsis) opens the Select Patient Status window. For information on the Select Patient Status window, see Select Patient Status Window on page 9.

Clicking  (delete) removes the currently selected patient status from the field.

**Year**
This search field indicates that the search list will only contain overdue patients who's provider is a student of the specified year.

Clicking  (ellipsis) opens the Select Student Year window. For information on the Select Student Year window, see Select Student Year Window on page 10.

Clicking  (delete) removes the currently selected student year from the field.

**Manager**
This search field indicates that the search list will only contain overdue patients who are assigned to the specified manager.

Clicking  (ellipsis) opens the Users List window. For information on the Users List window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Users List Window on page 171.

Clicking  (delete) removes the currently selected manager from the field.

**Search**
Clicking this button starts the search process. axiUm displays the search results in the list view.

**Print**
Clicking this button prints the current list of overdue patients to the default printer.
5 Select Patient Status Window

You can access this window by clicking the Pt Status (ellipsis) in the Overdue Patients window. For information on the Overdue Patients window, see *Overdue Patients Window* on page 7.

Use this window to select patient statuses used to filter the results when searching for overdue patients in the Overdue Patients window.

The items in the Select Patient Status window are defined in the Status Codes window. For information on the Status Codes window, refer to the axiUm Reference Manual for Maintenance and see *Status Codes Window* on page 19.
You can access this window by clicking the Year (ellipsis) in the Overdue Patients window. For information on the Overdue Patients window, see *Overdue Patients Window* on page 7.

Use this window to select student years used to filter the results when searching for overdue patients in the Overdue Patients window.

The items in the Select Student Year window are collected by axiUm from the entries made in the Current Year field of the Users window’s Provider tab’s Clinical section. For information on the Provider tab’s Clinical section, refer to the axiUm Reference Manual for Maintenance and see *Clinical Section* on page 550. For example, if your institution is new and currently enrolls only first-year students, their Current Year field will display 1, and therefore the Select Student Year window will only display year 1 and no other items.