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Table of Contents

About this Manual........................................................................................................ iii

Document Conventions ............................................................................................... iii
Document Icons .......................................................................................................... iv

Chapter 1: Field Definitions..................................................................................... 1

Add Patient Attachment Window .............................................................................. 1
Add Patient Consent Window .................................................................................. 2
Approve Patient Letter Window .............................................................................. 4
Edit Patient Attachment Window .......................................................................... 4
Move Attachment Items Window ............................................................................ 5
Patient Attachments Window .................................................................................. 6
Select Patient Letter Window .................................................................................. 10
Select Treatments for Consent Window ............................................................... 11
View Form Events Window ..................................................................................... 12
View Form Instructions Window ............................................................................ 13
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 Patient Attachments module windows.
- Use the fields and options in various Patient Attachments 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>🍒</td>
<td>Notes and helpful information. For example, things that will become apparent later on in the procedure.</td>
</tr>
<tr>
<td>⚠️</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>💡</td>
<td>Tips, ideas, and alternative methods. For example, using shortcuts, applying previously learned tools, or suggesting different uses.</td>
</tr>
<tr>
<td>🚨</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 Patient Attachments module, such as:

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

All the screen names that appear in the Patient Attachments module are listed in alphabetical order. Screens that are accessible through the Patient Attachments 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 Add Patient Attachment Window

You can access this window by going to the Patient Attachments window, selecting a tab of type Attachment, and clicking (Create a new Record). For information on the Patient Attachments window, see Patient Attachments Window on page 6.

Tab types are defined in the Attachment Sub-tabs window. For information on the Attachment Sub-tabs window, refer to the axiUm Reference Manual for Maintenance and see Attachment Sub-tabs Window on page 133.

Use this window to add attachments to patient records.
You can access this window by going to the Patient Attachments window, selecting a tab of type Consent, and clicking (Create a new Record). For information on the Patient Attachments window, see Patient Attachments Window on page 6.

Tab types are defined in the Attachment Sub-tabs window. For information on the Attachment Sub-tabs window, refer to the axiUm Reference Manual for Maintenance and see Attachment Sub-tabs Window on page 133.
Use this window to add consent forms to patient records.

### ADD PATIENT CONSENT WINDOW

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>This field indicates the date the consent was added. This defaults to the current date and can be moved to a date in the past. You cannot use a future date.</td>
</tr>
<tr>
<td>Consent</td>
<td>This field is the consent code for the selected consent form. Clicking (ellipsis) opens the Consent List window. For information on the Consent List window, refer to the axiUm Reference Manual for Maintenance and see Consent List Window on page 454.</td>
</tr>
<tr>
<td>Expiry</td>
<td>This field indicates the date the consent form expires.</td>
</tr>
<tr>
<td>Section</td>
<td>This drop-down field indicates the section in the Patient Attachments window to save the consent form. The option you select here affects the options available in the Sub-tab field.</td>
</tr>
<tr>
<td>Sub-tab</td>
<td>This indicates the sub-tab within the selected section (indicated in the Section drop-down field) of the Patient Attachments window to save the consent form.</td>
</tr>
<tr>
<td>Description</td>
<td>This field is enabled if the consent code displayed in the Consent field is a scanned-in consent form. This field indicates the description of the scanned-in consent form.</td>
</tr>
<tr>
<td>Attachment</td>
<td>This field is enabled if the consent code displayed in the Consent field is a scanned-in consent form. Scanned-in consents are those records in the Consent Codes window with the Scanned In option selected. For information on the Consent Codes window, refer to the axiUm Reference Manual for Maintenance and see Consent Codes Window on page 145. This field displays the file name of the selected scanned-in consent form. Clicking (ellipsis) opens the Select the Attachment File window for browsing and selecting a scanned-in consent file.</td>
</tr>
<tr>
<td>OK</td>
<td>Clicking this button saves the entries, closes the Add Patient Consent window, and attaches the selected patient consent form on the Patient Attachments window.</td>
</tr>
<tr>
<td>Cancel</td>
<td>Clicking this button cancels any entries and closes the Add Patient Consent window.</td>
</tr>
</tbody>
</table>
3 Approve Patient Letter Window

You can access this window by going to the Patient Attachments window, highlighting an item that requires approval, and clicking the Approve button. For information on the Patient Attachments window, see Patient Attachments Window on page 6.

Use this window to approve patient letters.

<table>
<thead>
<tr>
<th>Approve Patient Letter Window</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
</tr>
<tr>
<td>User</td>
</tr>
<tr>
<td>Description</td>
</tr>
<tr>
<td>Approve</td>
</tr>
<tr>
<td>Deny</td>
</tr>
<tr>
<td>Cancel</td>
</tr>
</tbody>
</table>

4 Edit Patient Attachment Window

You can access this window by going to the Patient Attachments window, selecting a tab of type Attachment, and clicking (Edit Record) or selecting the Edit Date/Description right-click. For information on the Patient Attachments window, see Patient Attachments Window on page 6.

Tab types are defined in the Attachment Sub-tabs window. For information on the Attachment Sub-tabs window, refer to the axiUm Reference Manual for Maintenance and see Attachment Sub-tabs Window on page 133.

Use this window to modify the name and date of attachments existing in patient records.
You can access this window by going to the Patient Attachments window, selecting a tab, and selecting the Move to another tab right-click option.

Use this window to move attachments existing in a patient record from one tab to another.
**MOVE ATTACHMENT ITEMS WINDOW**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Section</strong></td>
<td>This drop-down field indicates the section in the Patient Attachments window to move the selected file. The option you select here affects the options available in the Sub-tab field.</td>
</tr>
<tr>
<td><strong>Tab</strong></td>
<td>This drop-down field indicates the section in the Patient Attachments window to move the selected file.</td>
</tr>
<tr>
<td><strong>OK</strong></td>
<td>Clicking this button saves the changes and closes the Move Attachment Items window.</td>
</tr>
<tr>
<td><strong>Cancel</strong></td>
<td>Clicking this button cancels any changes and closes the Move Attachment Items window.</td>
</tr>
</tbody>
</table>

### 6 Patient Attachments Window

This is the main Patient Attachments module window.

You can access this window by:

- Clicking **Patient Attachments** from the axiUm main screen icons.
- Clicking the Patient Attachment option from the Actions menu.
- Clicking **Patient Attachments** from the Desktop.

Use this window for managing attachments in the patient’s record.
PATIENT ATTACHMENTS WINDOW

Create a new Record

Clicking this icon displays one of the following windows:

- **Add Form**: axiUm displays this window if the selected tab is defined as type EPR Form. For information on the Add Form window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Add Form Window on page 1.

- **Add Patient Attachment**: axiUm displays this window if the selected tab is defined as type Attachment. For information on the Add Patient Attachment window, see Add Patient Attachment Window on page 1.

- **Add Patient Consent**: axiUm displays this window if the selected tab is defined as type Consent. For information on the Add Patient Consent window, see Add Patient Consent Window on page 2.

- **Select Patient Letter**: axiUm displays this window if the selected tab is defined as type Letter. For information on the Select Patient Letter window, see Select Patient Letter Window on page 10.

Tab types are defined in the Attachment Sub-tabs window. For information on the Attachment Sub-tabs window, refer to the axiUm Reference Manual for Maintenance and see Attachment Sub-tabs Window on page 133.

Edit Record

Clicking this icon displays the associated edit window.

Delete Record

Clicking this icon permanently deletes the item selected from the list view.

Preview Report

Clicking this icon displays the report associated to the highlighted item in the list view.
### Patient Attachments Window

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="print_icon.png" alt="Print Report" /></td>
<td><strong>Print Report</strong> Clicking this icon prints the report associated to the highlighted item in the list view.</td>
</tr>
</tbody>
</table>
| ![Suspend Form](suspend_icon.png) | **Suspend Form** This icon is available if the following conditions are met:  
- The selected tab is defined as type EPR Form.  
- The record highlighted in the list view is not suspended.  
Tab types are defined in the Attachment Sub-tabs window. For information on the Attachment Sub-tabs window, refer to the axiUm Reference Manual for Maintenance and see Attachment Sub-tabs Window on page 133.  
Clicking this icon displays the Suspend Form window. For information on the Suspend Form window, axiUm Reference Manual for Rolodex & Patient Card and see Suspend Form Window on page 167. |
| ![Unsuspend Form](unsuspend_icon.png) | **Unsuspend Form** This icon is available if the following conditions are met:  
- The selected tab is defined as type EPR Form.  
- The record highlighted in the list view is suspended.  
Clicking this icon unsuspends the form.  
Suspended forms are displayed in gray text. |
| ![Add scanned Record](add_record_icon.png) | **Add scanned Record** Clicking this icon displays the Add Patient Attachment window. For information on the Add Patient Attachment window, see Add Patient Attachment Window on page 1. |
| ![Scan to Files](scan_icon.png) | **Scan to Files** Clicking this icon launches the TWAIN driver for the scanner attached to the system and allows the user to capture and then store the file in the patient record. |
| ![Release of patient information consent on file](consent_icon.png) | **Release of patient information consent on file** This checkbox, if selected, indicates that the patient has signed a Consent to the Release of Information.  
This checkbox controls the sending of EDI (electronic data interchange) insurance claims for the patient:  
- If you process claims using EDI, this checkbox must be selected for patients axiUm generates EDI claims.  
- If you process claims manually, this checkbox must be selected for patients with the Sig Req'd checkbox selected in the Patient Info window's Insurance tab. For information on the Sig Req'd checkbox, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Other Areas on page 107. |
| ![Show Deleted](delete_icon.png) | **Show Deleted** This checkbox is shown if the selected tab is defined as type Attachment, Consent, or Letter.  
This checkbox, if selected, includes deleted records in the list view. |
| ![Approve](approve_icon.png) | **Approve** This button is shown if the selected tab is defined as type Letter.  
This button is enabled if the item highlighted in the list view requires approval.  
Clicking this button displays the Approve Patient Letter window. For information on the Approve Patient Letter window, see Approve Patient Letter Window on page 4. |
### Patient Attachments Window

<table>
<thead>
<tr>
<th>Section</th>
<th>The items displayed in this list view are those available to you, as defined in the Attachment Sections window. For information on the Attachment Sections window, refer to the axiUm Reference Manual for Maintenance and see Attachment Sections Window on page 131.</th>
</tr>
</thead>
<tbody>
<tr>
<td>[tabs]</td>
<td>The tabs displayed are those available to you for the category highlighted in the Section list box, as defined in the Attachment Displays window. For information on the Attachment Displays window, refer to the axiUm Reference Manual for Maintenance and see Attachment Displays Window on page 129.</td>
</tr>
</tbody>
</table>
| Finalize Letter | This right-click option is available if the following conditions are met:  
- The selected tab is defined as type Letter.  
- The highlighted record is a draft letter.  
Tab types are defined in the Attachment Sub-tabs window. For information on the Attachment Sub-tabs window, refer to the axiUm Reference Manual for Maintenance and see Attachment Sub-tabs Window on page 133.  
Selecting this right-click option changes the selected letter from its draft state to finalized state. |
| Change to Draft | This right-click option is available if the following conditions are met:  
- The selected tab is defined as type Letter.  
- The highlighted record is a finalized letter.  
Tab types are defined in the Attachment Sub-tabs window. For information on the Attachment Sub-tabs window, refer to the axiUm Reference Manual for Maintenance and see Attachment Sub-tabs Window on page 133.  
Selecting this right-click option changes the selected letter back from its finalized state to draft state. |
| Move to another tab | Selecting this right-click option displays the Move Attachment Items window. For information on the Move Attachment Items window, see Move Attachment Items Window on page 5. |
| Print List | Selecting this right-click option prints the items on the list view to the default printer. |
| Edit Date/Description | Selecting this right-click option displays one of the following windows:  
- Edit Form Information: For information on the Edit Form Information window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Edit Form Information Window on page 33.  
- Edit Patient Attachment: For information on the Edit Patient Attachment window, see Edit Patient Attachment Window on page 4. |
| View Form Events | Selecting this right-click option displays the View Form Events window. For information on the View Form Events window, see View Form Events Window on page 12. |
7 Select Patient Letter Window

You can access this window by going to the Patient Attachments window, selecting a tab defined as a type Letter, and clicking (Create a new Record). For information on the Patient Attachments window, see Patient Attachments Window on page 6.

Tab types are defined in the Attachment Sub-tabs window. For information on the Attachment Sub-tabs window, refer to the axiUm Reference Manual for Maintenance and see Attachment Sub-tabs Window on page 133.

Use this window to create a template for patient letters, or to select an existing template to create a letter.

**Select Patient Letter Window**

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td>Clicking this button displays the <em>Add Letter</em> window. For information on the <em>Add Letter</em> window, refer to the axiUm Reference Manual for Info Manager and see <em>Add Letter Window</em> on page 3.</td>
</tr>
<tr>
<td>Select</td>
<td>Clicking this button displays the letter highlighted in the list view.</td>
</tr>
<tr>
<td>Close</td>
<td>Clicking this button closes the <em>Select Patient Letter</em> window.</td>
</tr>
</tbody>
</table>
8 Select Treatments for Consent Window

You can access this window by going to the Add Patient Consent window, selecting a treatment-based consent, and clicking the OK button. For information on the Add Patient Consent window, see Add Patient Consent Window on page 2.

Use this window to select treatment records associated to the selected consent form.

![Select Treatments for Consent Window](image)

### SELECT TREATMENT FOR CONSENT WINDOW

- **Planned**: This checkbox, if selected, indicates to include planned treatment records in the list view.
- **In Process**: This checkbox, if selected, indicates to include in-process treatment records in the list view.
- **Completed**: This checkbox, if selected, indicates to include completed treatment records in the list view.
- **Show only treatments that require __**: This checkbox, if selected, indicates to show only those treatments that require the selected consent type.
  
  For example: Show only treatments that require SCAN - scanned-in consent forms. The consent code (SCAN) and the description (scanned-in consent forms) are defined in the Consent Codes window.
  
  For information on the Consent Codes window, refer to the axiUm Reference Manual for Maintenance and see Consent Codes on page 145.

- **Select All**: Clicking this button highlights all records in the list view.
- **Deselect All**: Clicking this button deselects all records in the list view.
### SELECT TREATMENT FOR CONSENT WINDOW

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>OK</strong></td>
<td>Clicking this button selects any highlighted treatment records and closes the Select Treatments for Consent window.</td>
</tr>
<tr>
<td><strong>Cancel</strong></td>
<td>Clicking this button cancels any highlighted treatment records and closes the Select Treatments for Consent window.</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>The first disabled field indicates the patient amount of all records highlighted in the list view. &lt;br&gt;The second disabled field indicates the insurance amount of all records highlighted in the list view.</td>
</tr>
</tbody>
</table>

### 9 View Form Events Window

You can access this window by going to the Patient Attachments window, selecting a tab defined as a type EPR Form, and selecting the View Form Events right-click option. For information on the Patient Attachments window, see *Patient Attachments Window* on page 6.

Tab types are defined in the Attachment Sub-tabs window. For information on the Attachment Sub-tabs window, refer to the axiUm Reference Manual for Maintenance and see *Attachment Sub-tabs Window* on page 133.

Use this window to view a history of form actions, as entered in the Add Form Action window. For information on the Add Form Action window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see *Add Form Action Window* on page 3.
You can access this window by:

- Clicking in the EHR window’s Forms tab. For information on the EHR window’s Forms tab, refer to the axiUm Reference Manual for EHR and see Forms Tab on page 60.
- Going to the EHR window’s Forms tab and selecting the Show Form Instructions right-click option. This method displays instructions for the form itself. For information on the EHR window’s Forms tab, refer to the axiUm Reference Manual for EHR and see Forms
Tab on page 60.

- Going to the EHR window’s Forms tab and selecting the Show Instructions right-click option. This method displays instructions for the highlighted item within the selected form. For information on the EHR window’s Forms tab, refer to the axiUm Reference Manual for EHR and see *Forms Tab* on page 60.

Use this window to view any instructions about the selected EPR form or its questions.

**FORM INSTRUCTIONS WINDOW**

| Instructions | This disabled text box displays instructions associated to the selected form, group heading, question, checklist, or additional information, as entered in the *Instructions* text box of the *Form Instructions* window. For information on the *Form Instructions* window, refer to the axiUm Reference Manual for Maintenance and see *Form Instructions Window* on page 219. |