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

- Follow document conventions.
- Familiarize yourself with the Perio Chart module windows.
- Use the fields and options in various Perio Chart 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 Perio Chart module, such as:

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

All the screen names that appear in the Perio Chart module are listed in alphabetical order. Screens that are accessible through the Perio Chart 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 Perio Window

You can access this window by:

- Clicking (Enter Perio Exam) on the Perio Chart window. For information on the Perio Chart window, see Perio Chart Window on page 9.
- Going to the Select Perio Date window and clicking the Resume button. For information on the Select Perio Date window, see Select Perio Date Window on page 32.

Use this window to enter a new perio exam record or to resume entering an incomplete perio exam.
The periodontal chart is divided into four views. Each view represents a quadrant of the mouth.

**ADD PERIO WINDOW**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exam Type</td>
<td>This drop-down field indicates the type of exam being entered. The options in the drop-down field are defined in the <em>Periodontal Exam Types</em> window. For information on the <em>Periodontal Exam Types</em> window, refer to the axiUm Reference Manual for Maintenance and see <em>Periodontal Exam Types Window</em> on page 681.</td>
</tr>
<tr>
<td>[date]</td>
<td>This drop-down field indicates the date of the perio exam. You can select a past date or the current date.</td>
</tr>
<tr>
<td>Save</td>
<td>Clicking this button saves any perio entries made throughout this session.</td>
</tr>
<tr>
<td>Reset</td>
<td>Clicking this button reverts the perio chart to the last saved entries.</td>
</tr>
<tr>
<td>Clear All</td>
<td>Clicking this button clears all perio entries on the chart, including those you saved during this session.</td>
</tr>
<tr>
<td>Incomplete</td>
<td>Clicking this button saves the entries and closes the <em>Add Perio</em> window. You can resume charting at a later date.</td>
</tr>
<tr>
<td>Complete</td>
<td>Clicking this button saves the entries and closes the <em>Add Perio</em> window. You cannot resume charting at a later date.</td>
</tr>
<tr>
<td>Cancel</td>
<td>Clicking this button cancels any entries and closes the <em>Add Perio</em> window.</td>
</tr>
</tbody>
</table>
### Add Perio Window

This section displays perio readings entered. For information on perio entries, see [readings] in this table.

Access to the perio options displayed in the margins are defined in the *Periodontal Display Options* window. For information on the *Periodontal Display Options* window, refer to the axiUm Reference Manual for Maintenance and see [Periodontal Display Options Window] on page 672.

This field indicates the quadrant displayed on the chart.

Clicking [up arrow] (up arrow) and [down arrow] (down arrow) scrolls up and down the following options:

- **Maxillary Right**: This option changes the chart to display the upper right quadrant.
- **Maxillary Left**: This option changes the chart to display the upper left quadrant.
- **Mandibular Right**: This option changes the chart to display the lower right quadrant.
- **Mandibular Left**: This option changes the chart to display the lower left quadrant.

These three cells indicate the perio readings entered for the selected tooth and condition.

Clicking this button clears the reading on the current cell. The cursor remains in the current cell so you can re-enter the value.

Clicking this button clears all three readings for the currently selected tooth.

If the condition requires Yes/No readings, axiUm resets these cells to No values.

Clicking this button moves the cursor up to the next perio condition line.

Clicking this button moves the cursor down to the next perio condition line.

Clicking this button moves the cursor to the previous valid site for this condition.

Clicking this button moves the cursor to the next valid site for this condition.

The entry box displays all possible reading values for the selected condition.

The list view displays details of all reading values displayed in the entry box.

Clicking this button displays the *Tooth Notes/Conditions* window. For information on the *Tooth Notes/Conditions* window, refer to the axiUm Reference Manual for EHR and see [Tooth Notes/Conditions Window] on page 192.

### 2 Add Treatment Window

You can access this window by going to the Perio Tx History window and clicking [Create a new Record]. For information on the Perio Tx History window, see *Perio Tx History Window* on page 20.
Use this window to add planned treatment records for the selected patient.

![Add Treatment Window](image)

**ADD TREATMENT WINDOW**

**Provider**
- This field indicates the treatment provider.
- Clicking (ellipsis) opens the *Providers List* window to select from.

**Date**
- This is the date for which this planned treatment record was created.
- You can select the current date or an earlier date. You cannot select a future date.

**Code**
- This field indicates the procedure code for the selected procedure.
- Clicking (ellipsis) opens the *Procedure Codes List* window. For information on the *Procedure Codes List* window, refer to the axiUm Reference Manual for Maintenance and see *Procedure Codes List Window* on page 60.

**Desc.**
- This field indicates the description for the code displayed in the *Code* field.

**Unit**
- This field indicates the number of planned treatment units.
- This field affects the treatment total if procedure codes are set up with factor units. In other words, in the *Procedure Code* window's Options section, the *Factor Units?* checkbox is selected and the associated field displays a value. For information on the *Procedure Code* window's Options section, refer to the axiUm Reference Manual for Maintenance and see *Options Section* on page 70.
- For other procedure codes that are not set up this way, this *Unit* field is enabled but it does not affect the amount charged for the treatment.

**Site**
- The first field indicates the tooth number for this planned treatment.
- The second field indicates the second tooth number for procedures that require more than one site (e.g. bridge procedures).
## ADD TREATMENT WINDOW

<table>
<thead>
<tr>
<th><strong>Surfaces</strong></th>
<th>This field indicates the tooth surfaces to apply for this planned treatment.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Discipline</strong></td>
<td>This drop-down field indicates the discipline associated to this planned treatment.</td>
</tr>
</tbody>
</table>

The items in this drop-down field are defined in the Treatment Disciplines window. For information on the Treatment Disciplines window, refer to the axiUm Reference Manual for Maintenance and see Treatment Disciplines Window on page 90.

<table>
<thead>
<tr>
<th><strong>Diagnosis</strong></th>
<th>This field indicates the diagnosis associated to this planned treatment.</th>
</tr>
</thead>
</table>

Clicking (ellipsis) opens the Select Clinical Diagnosis window to select from. For information on the Select Clinical Diagnosis window, refer to the axiUm Reference Manual for Maintenance and see Select Clinical Diagnosis Window on page 158.

<table>
<thead>
<tr>
<th><strong>Phase</strong></th>
<th>This disabled field indicates the phase assigned to this planned treatment record.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sequence</strong></td>
<td>This disabled field indicates the sequence assigned to this planned treatment record.</td>
</tr>
</tbody>
</table>

| [custom field] | This custom drop-down field is defined in the Custom Fields window using the Treatment/Note fields. For information on the Custom Fields window, refer to the axiUm Reference Manual for Maintenance and see Custom Fields Window on page 9. |

The options displayed in this drop-down field are defined in the Custom Codes window. For information on the Custom Codes window, refer to the axiUm Reference Manual for Maintenance and see Custom Codes Window on page 7.

| [custom field] | This custom drop-down field is defined in the Custom Fields window using the Treatment (Clinical) fields. For information on the Custom Fields window, refer to the axiUm Reference Manual for Maintenance and see Custom Fields Window on page 9. |

The options displayed in this drop-down field are defined in the Custom Codes window custom code type Treatment (Clinical). For information on the Custom Codes window, refer to the axiUm Reference Manual for Maintenance and see Custom Codes Window on page 7.
ADD TREATMENT WINDOW

Status

This section indicates the status of planned treatment, and displays the following options:

- **Planned**: Selecting this indicates that this treatment is planned. This is the only option enabled in the Add Treatment window.
- **In Process**: Selecting this indicates that this treatment is in-process. This option is enabled in the Edit Planned Treatment window.
- **Completed**: If this option is selected, it indicates that this treatment is completed. The status of completed treatments cannot be changed. This option is enabled in the Edit Planned Treatment window.

For information on the Edit Planned Treatment window, refer to the axiUm Reference Manual for EHR and see Edit Planned Treatment Window on page 31.

<table>
<thead>
<tr>
<th>Edit Billing Information</th>
<th>This checkbox is shown for users that don't require approval for treatments and regularly bypass the approval window.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>This checkbox, if deselected, indicates that axiUm will bypass the approval window, and automatically approve the billing information associated to this treatment.</td>
</tr>
<tr>
<td></td>
<td>This checkbox, if selected, indicates that axiUm will display the approval window (where billing information is displayed) and you can change the billing information before treatment is approved.</td>
</tr>
</tbody>
</table>

OK

Clicking this button saves the entries and closes the Add Treatment window.

Add

Clicking this button saves the entries but the Add Treatment window remains displayed.

Cancel

Clicking this button cancels any entries and closes the Add Treatment window.

3 Edit/Review Perio Window

You can access this window by going to the Select Perio Date window and clicking the Edit/Review button. For information on the Select Perio Date window, see Select Perio Date Window on page 32.

Use this window to review your entries and make corrections to an incomplete perio exam.
EDIT/REVIEW PERIO WINDOW

**Exam Type**
This drop-down field indicates the type of exam being entered.

The options in the drop-down field are defined in the *Periodontal Exam Types* window. For information on the *Periodontal Exam Types* window, refer to the axiUm Reference Manual for Maintenance and see *Periodontal Exam Types Window* on page 681.

**[date]**
This disabled drop-down field indicates the date of the initial perio exam.

If you opened the *Edit/Review Perio* window by going to the *Select Perio Date* window and clicking the *Resume* button, axiUm displays the current date in this drop-down field.

If you opened the *Edit/Review Perio* window by going to the *Select Perio Date* window and clicking the *Edit/Review* button, axiUm displays the original perio date from the first entry.

For information on the *Select Perio Date* window, see *Select Perio Date Window* on page 32.

**Save**
Clicking this button saves any perio entries made throughout this session.

**Reset**
Clicking this button reverts the perio chart to the last saved entries.

**Clear All**
Clicking this button clears all perio entries on the chart, including those you saved during this session.

**Incomplete**
Clicking this button saves the entries and closes the *Edit/Review Perio* window.

You can resume charting at a later date.
**EDIT/REVIEW PERIO WINDOW**

**Complete**
Clicking this button saves the entries and closes the *Edit/Review Perio* window.
You cannot resume charting at a later date.

**Cancel**
Clicking this button cancels any entries and closes the *Edit/Review Perio* window.

**[chart]**
This section displays perio readings entered. For information on perio entries, see **[readings]** in this table.
Access to the perio options displayed in the margins are defined in the *Periodontal Display Options* window. For information on the *Periodontal Display Options* window, refer to the axiUm Reference Manual for Maintenance and see *Periodontal Display Options Window* on page 672.

**[field]**
This field indicates the quadrant displayed on the chart.

Clicking (up arrow) and (down arrow) scrolls up and down the following options:
- *Maxillary Right*: This option changes the chart to display the upper right quadrant.
- *Maxillary Left*: This option changes the chart to display the upper left quadrant.
- *Mandibular Right*: This option changes the chart to display the lower right quadrant.
- *Mandibular Left*: This option changes the chart to display the lower left quadrant.

**[readings]**
These three cells indicate the perio readings entered for the selected tooth and condition.

**Clear**
Clicking this button clears the reading on the current cell. The cursor remains in the current cell so you can re-enter the value.

**Clr Tooth**
Clicking this button clears all three readings for the currently selected tooth.
If the condition requires Yes/No readings, axiUm resets these cells to No values.

**Up**
Clicking this button moves the cursor up to the next perio condition line.

**Down**
Clicking this button moves the cursor down to the next perio condition line.

**Previous**
Clicking this button moves the cursor to the previous valid site for this condition.

**Next**
Clicking this button moves the cursor to the next valid site for this condition.

**[entry box]**
The entry box displays all possible reading values for the selected condition.

**[list view]**
The list view displays details of all reading values displayed in the entry box.

**Notes/Conditions**
Clicking this button displays the *Tooth Notes/Conditions* window. For information on the *Tooth Notes/Conditions* window, refer to the axiUm Reference Manual for EHR and see *Tooth Notes/Conditions Window* on page 192.
4 Perio Chart Window

This is the main Transactions module window. axiUm displays the most recent perio chart for the selected patient.

You can access this window by:

- Clicking (Perio Chart) from the axiUm main screen icons.
- Clicking the Perio Chart option from the Actions menu.
- Clicking (Perio Chart) from the Desktop.

Use this window for all your daily periodontal tasks.

PERIO CHART WINDOW

Clicking (up arrow) displays the **Maxillary** option and the chart changes to display upper teeth.

Clicking (down arrow) displays the **Mandibular** option and the chart changes to display lower teeth.

Clicking this icon displays the Add Perio window. For information on the Add Perio window, see *Add Perio Window* on page 1.
### PERIO CHART WINDOW

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="View Form History" /></td>
<td>Clicking this icon displays the Select Perio Date window. For information on the Select Perio Date window, see Select Perio Date Window on page 32.</td>
</tr>
<tr>
<td><img src="image" alt="Full View" /></td>
<td>Clicking this icon displays the Perio Full View Selection window. For information on the Perio Full View Selection window, see Perio Full View Selection Window on page 17.</td>
</tr>
<tr>
<td><img src="image" alt="Compare Form" /></td>
<td>Clicking this icon displays the Periodontics Comparison Settings window. For information on the Periodontics Comparison Settings window, see Periodontics Comparison Settings Window on page 30.</td>
</tr>
<tr>
<td><img src="image" alt="View Statistics" /></td>
<td>Clicking this icon displays the Perio Statistics report.</td>
</tr>
<tr>
<td><img src="image" alt="Perio Treatment History" /></td>
<td>Clicking this icon displays the Perio Tx History window. For information on the Perio Tx History window, see Perio Tx History Window on page 20.</td>
</tr>
<tr>
<td><img src="image" alt="EPR Forms" /></td>
<td>Clicking this icon displays the Perio EPR Forms window. For information on the Perio EPR Forms window, see Perio EPR Forms Window on page 10.</td>
</tr>
<tr>
<td><img src="image" alt="Patient Attachments" /></td>
<td>Clicking this icon displays the Patient Attachments window. For information on the Patient Attachments window, refer to the Patient Attachments manual.</td>
</tr>
<tr>
<td><img src="image" alt="Print Form Report" /></td>
<td>Clicking this icon displays the Perio Print Options window. For information on the Perio Print Options window, see Perio Print Options Window on page 19.</td>
</tr>
<tr>
<td><img src="image" alt="Options/Settings" /></td>
<td>Clicking this option displays the Perio Options window. For information on the Perio Options window, see Perio Options Window on page 18.</td>
</tr>
</tbody>
</table>

[chart] This section displays perio readings entered. For information on perio entries, see [readings] in this table.

Access to the perio options displayed in the margins are defined in the Periodontal Display Options window. For information on the Periodontal Display Options window, refer to the axiUm Reference Manual for Maintenance and see Periodontal Display Options Window on page 672.

**Tooth Notes/Conditions** Selecting this right-click option from the tooth number displays the Tooth Notes/Conditions window. For information on the Tooth Notes/Conditions window, refer to the axiUm Reference Manual for EHR and see Tooth Notes/Conditions Window on page 192.

## 5 Perio EPR Forms Window

You can access this window by clicking **(EPR Forms)** in the Perio Chart window. For information on the Perio Chart window, see Perio Chart Window on page 9.
Use this window to enter the perio type and prognosis, and to display axiUm-calculated PSR (Periodontal Screening and Recording) score, a diagnostic screening tool for the early detection of periodontal disease.

**PERIO EPR FORMS WINDOW**

**Form**

This drop-down field indicates the type of perio form displayed in this window. The options in this drop-down field are all those forms in this patient record.

**[field]**

This disabled field indicates the unique tracking number to identify this form. This axiUm-generated number is used for reporting purposes.

**[field]**

This disabled field indicates the date this provider assignment EPR form was created.

**Chart**

This disabled field indicates the patient’s chart number.

**Perio Type**

This drop-down field indicates the perio classification of the selected patient. The options in this drop-down field are defined in the Periodontal Patient Types window. For information on the Periodontal Patient Types window, refer to the axiUm Reference Manual for Maintenance and see Periodontal Patient Types Window on page 685.

**Prognosis**

This drop-down field indicates the perio prognosis of the selected patient. The options in this drop-down field are defined in the Periodontal Prognosis window. For information on the Periodontal Prognosis window, refer to the axiUm Reference Manual for Maintenance and see Periodontal Prognosis Window on page 687.

**Create a new Record**

Clicking this icon displays the Add Form window. 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.
**PERIO EPR FORMS WINDOW**

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Select Form" /></td>
<td>This icon is displayed if you have an EPR form displayed in the Provider Assignment EPR Forms window. Clicking this icon displays the Select Form window. For information on the Select Form window, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see Select Form Window on page 161.</td>
</tr>
<tr>
<td><img src="image" alt="Delete Record" /></td>
<td>Clicking this icon permanently deletes the item selected from the list box.</td>
</tr>
<tr>
<td><img src="image" alt="View Form History" /></td>
<td>Clicking this icon displays the Select Form History window.</td>
</tr>
<tr>
<td><img src="image" alt="Add Action" /></td>
<td>Clicking this icon displays the Add Form Action window. For information on the Add Form Action window, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see Add Form Action Window on page 3.</td>
</tr>
<tr>
<td><img src="image" alt="Suspend Form" /></td>
<td>This icon is shown if the item highlighted in the list view is an unsuspended form. Clicking this icon displays the Suspend Form window. For information on the Suspend Form window, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see Suspend Form Window on page 167.</td>
</tr>
<tr>
<td><img src="image" alt="Unsuspend Form" /></td>
<td>This icon is shown if the item highlighted in the list view is a suspended form. Clicking this icon releases the highlighted form in the Forms on File list box from suspension.</td>
</tr>
<tr>
<td><img src="image" alt="Patient Card" /></td>
<td>Clicking this icon displays the Patient Card window containing the details of the patient highlighted in the patient selection list. For information on the Patient Card window, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see Patient Card Window on page 61.</td>
</tr>
<tr>
<td><img src="image" alt="Print Form Report" /></td>
<td>Clicking this icon displays the Print Form window.</td>
</tr>
</tbody>
</table>
**Perio EPR Forms Window**

**PSR**

This section indicates the PSR scores for the selected patient. PSR score values can be calculated by the system or can be manually entered by the provider. Each box represents an intraoral sextant. Intraoral sextants are designated S1-S6 beginning in the maxillary upper right sextant (S1), proceeding in a clockwise manner, and finishing in the mandibular lower right sextant (S6).

PSR scores are based on the most recent exam performed with an I (in-process), C (complete), or closed status.

These checkboxes are disabled if they are auto-calculated.

These checkboxes are enabled if you are required to manually enter the values.

The calculate PSR scores option can be selected in the Periodontal Display Options window. For information on the Periodontal Display Options window, refer to the axiUm Reference Manual for Maintenance and see Periodontal Display Options Window on page 672.

PSR codes are based on the following system:

- **0**: Pockets <3.5 mm with no calculus or bleeding. Colored area of probe remains completely visible in the deepest crevice in the sextant. No calculus or defective margins are detected. Gingival tissues are healthy with no bleeding after gentle probing.

- **1**: Pockets <3.5 mm with bleeding. Colored area of probe remains completely visible in the deepest probing depth in the sextant. No calculus or margins are detected. There is bleeding after gentle probing.

- **2**: Pockets <3.5 mm with calculus or overhang. Colored area of probe remains completely visible in the deepest probing depth in the sextant. Supra- or subgingival calculus and/or defective margins are detected.

- **3**: Pockets 3.5 mm or more. Colored area of probe remains partly visible in the deepest probing depth in the sextant.

- **4**: Pockets 5.5 mm or more. Colored area of probe completely disappears, indicating probing depth of greater than 5.5 mm.

- *****: Clinical abnormalities including but not limited to furcation invasion, mobility, mucogingival problems, or recession extending to the colored area of the probe (3.5+ mm). The checkbox is used to indicate a clinical abnormality in that sextant.

- **X**: An edentulous (missing) sextant.

PSR scores are calculated on the worst score within a sextant. For example, if there are pockets of 3.2 mm on one site and 5.1 mm on another site within the same sextant, axiUm calculates the PSR score based on the 5.1 mm pocket.
## Medical Alerts

This section is based on an Oracle function. axiUm displays information in this section if the following conditions are met:

- The **EHR Display Options** window’s **Alerts to Display** section has the **Medical Alerts** checkbox selected. For information on the **EHR Display Options** window, refer to the axiUm Reference Manual for Maintenance and see **EHR Display Options Window** on page 164.

- The **Patient Prescription Entry** window’s **Medical Alerts** list box displays medical alert records. For information on the **Patient Prescription Entry** window, refer to the axiUm Reference Manual for EHR and see **Patient Prescription Entry Window** on page 130.

## Show Perio Status History

This right-click option is available from the:

- **Medical Alerts** section

- list view

Selecting this right-click option displays the **Show Perio Status History** window. For information on the **Show Perio Status History** window, see **Show Perio Status History Window** on page 33.

## Show Form Instructions...

This right-click option is enabled if any instructions exist for the selected form.

This right-click option displays the **View Form Instructions** window that shows general instructions for the form. For information on the **View Form Instructions** window, see the Patient Attachments manual.

## Show Form Owner...

This right-click option is available from the display view.

This right-click option is enabled if the form is associated to a treatment or another module (e.g. **Lab Tracking** module) where this form was originally attached.

Selecting this right-click option opens the **View Treatment** window or the associated module window (e.g. **Lab Order Details** window, **Referred By** window).

## Show Instructions...

This right-click option is enabled if any instructions exist for the selected item (e.g. checklist, question).

This right-click option displays the **View Form Instructions** window that shows instructions for the highlighted question. For information on the **View Form Instructions** window, see the Patient Attachments manual.

## Show History...

This right-click option is available from the display view.

Selecting this right-click option opens the **Show Form Answer History** window. For information on the **Show Form Answer History** window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see **Show Form Answer History Window** on page 166.

## Answer Reviewed

This right-click option is available from the display view.

Selecting this right-click option indicates that the answer for this question has been reviewed. Answers that have been reviewed display in blue text.
PERIO EPR FORMS WINDOW

Clear Attachment  This right-click option is available from the display view.
This right-click option is enabled if the highlighted record is an attachment-type question
and the answer contains an attachment.

6 Perio Full Mouth View Window

You can access this window by:

• Going to the Perio Chart window and clicking (Full View), if the Perio Options
  window’s Full Mouth View drop-down field displays the Graphical option. For
  information on the Perio Chart window, see Perio Chart Window on page 9. For
  information on the Perio Options window, see Perio Options Window on page 18.

• You can also access this window by going to the Perio Full View Selection window,
  selecting the Graphic Values option, and clicking the OK button. For information on the
  Perio Full View Selection window, see Perio Full View Selection Window on page 17.

Use this window to graphically view the chart details.
7 Perio Full Text View Window

You can access this window by:

- Going to the Perio Chart window and clicking (Full View), if the Perio Options window’s Full Mouth View drop-down field displays the Text option. For information on the Perio Chart window, see Perio Chart Window on page 9. For information on the Perio Options window, see Perio Options Window on page 18.

- You can also access this window by going to the Perio Full View Selection window, selecting the Text Values option, and clicking the OK button. For information on the Perio Full View Selection window, see Perio Full View Selection Window on page 17.

Use this window to view the chart details in text-only mode.
8 Perio Full View Selection Window

You can access this window by clicking (Full View) in the Perio Chart window. For information on the Perio Chart window, see Perio Chart Window on page 9.

Use this window to select the view mode for displaying the full perio chart.
**PERIO FULL VIEW SELECTION WINDOW**

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Text Values</strong></td>
<td>This option, if selected, indicates to display user-entry values on the chart.</td>
</tr>
<tr>
<td><strong>Graphic Values</strong></td>
<td>This option, if selected, indicates to display the graphic equivalent of user-entry values on the chart.</td>
</tr>
<tr>
<td><strong>OK</strong></td>
<td>Clicking this button closes the <em>Perio Full View Selection</em> window and displays the following:</td>
</tr>
<tr>
<td></td>
<td>• If you selected the <em>Text Values</em> option, axiUm displays the <em>Perio Full Text View</em> window. For information on the <em>Perio Full Text View</em> window, see <em>Perio Full Text View Window</em> on page 16.</td>
</tr>
<tr>
<td></td>
<td>• If you selected the <em>Graphic Values</em> option, axiUm displays the <em>Perio Full Mouth View</em> window. For information on the <em>Perio Full Mouth View</em> window, see <em>Perio Full Mouth View Window</em> on page 15.</td>
</tr>
<tr>
<td><strong>Cancel</strong></td>
<td>Clicking this button cancels any entries and closes the <em>Perio Full View Selection</em> window.</td>
</tr>
</tbody>
</table>

**9 Perio Options Window**

You can access this window by clicking ![Options/Settings](image) in the Perio Chart window. For information on the Perio Chart window, see *Perio Chart Window* on page 9.

Use this window to show or hide graphs and condition symbols.

![Perio Options Window](image)

**PERIO OPTIONS WINDOW**

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Show graphs on teeth</strong></td>
<td>This checkbox, if selected, indicates to display the graphic representation of the tooth condition on the 3D tooth image (i.e. those images displayed on the graph lines).</td>
</tr>
<tr>
<td></td>
<td>This checkbox, if deselected, indicates to hide the graphic representation of the tooth condition, but the 3D tooth image still displays on the window.</td>
</tr>
</tbody>
</table>
**Perio Options Window**

**Show tooth condition symbols**

This checkbox, if selected, indicates to display the graphic representation of non-perio tooth conditions (i.e. those displayed on ungraphed lines).

This checkbox, if selected, indicates to hide the graphic representation of non-perio tooth conditions.

**Full Mouth View**

The view can be set to the following options:

- **Selectable:** This option indicates that going to the Perio Chart window and clicking (Full View) displays the Perio Full View Selection window. For information on the Perio Full View Selection window, see Perio Full View Selection Window on page 17.

- **Text:** This option indicates that going to the Perio Chart window and clicking (Full View) displays the Perio Full Text View window. For information on the Perio Full Text View window, see Perio Full Text View Window on page 16.

- **Graphical:** This option indicates that going to the Perio Chart window and clicking (Full View) displays the Perio Full Mouth View window. For information on the Perio Full Mouth View window, see Perio Full Mouth View Window on page 15.

**OK**

Clicking this button saves the entries and closes the Perio Options window.

**Cancel**

Clicking this button cancels any entries and closes the Perio Options window.

---

### 10 Perio Print Options Window

You can access this window by clicking (Print Form Report) in the Perio Chart window. For information on the Perio Chart window, see Perio Chart Window on page 9.

Use this window to select the type of information to display on the Perio Chart report.
You can access this window by clicking (Perio Treatment History) in the Perio Chart window. For information on the Perio Chart window, see Perio Chart Window on page 9.

Use this window to view the treatment history of the selected patient.
**Perio Tx History Window**

**Site**
This disabled field indicates the tooth site numbers used in the filter criteria for the records displayed in this window.

Clicking (ellipsis) opens the Select Sites window. For information on the Select Sites window, refer to the axiUm Reference Manual for EHR and see Select Sites Window on page 176.

**From**
This field indicates the starting date range used in the filter criteria for the records displayed in the Perio Tx History window.

Clicking (ellipsis) opens the Select Date window. For information on the Select Date window, refer to the axiUm Reference Manual for EHR and see Select Date Window on page 164.

**To**
This field indicates the ending date range used in the filter criteria for the records displayed in the Perio Tx History window.

Clicking (ellipsis) opens the Select Date window. For information on the Select Date window, refer to the axiUm Reference Manual for EHR and see Select Date Window on page 164.

**Views**
This list box displays custom workstation settings for records displayed in this window.

The options displayed in this list box are defined in the Treatment History Views window. For information on the Treatment History Views window, refer to the axiUm Reference Manual for Maintenance and see Treatment History Views Window on page 244.

**Create a new Record**
Clicking this icon displays the Add Treatment window. For information on the Add Treatment window, see Add Treatment Window on page 3.
Clicking this icon displays the Select Note Type window for entering generic notes (not treatment-related). For information on the Select Note Type window, refer to the axiUm Reference Manual for EHR and see Select Note Type Window on page 166.

Clicking this icon displays one of the following windows depending on the record highlighted in the list view:

- **Appointment Request**: For information on the Appointment Request window, refer to the axiUm Reference Manual for Scheduler and see Appointment Request Window on page 50.

- **Edit Planned Treatment**: For information on the Edit Planned Treatment window, refer to the axiUm Reference Manual for EHR and see Edit Planned Treatment Window on page 31.

- **Edit Planned Appointment**: For information on the Edit Planned Appointment window, refer to the axiUm Reference Manual for Scheduler and see Edit Planned Appointment Window on page 77.

- **Edit In Process Treatment**: For information on the Edit In Process Treatment window, refer to the axiUm Reference Manual for EHR and see Edit In Process Treatment Window on page 27.

- **Edit Completed Treatment**: For information on the Edit Completed Treatment window, refer to the axiUm Reference Manual for EHR and see Edit Completed Treatment Window on page 24.

- **Patient Recalls**: For information on the Patient Recalls window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Patient Recalls Window on page 128.

- **View Treatment**: For information on the View Treatment window, refer to the axiUm Reference Manual for EHR and see View Treatment Window on page 245.

- **View Ortho Visit / Ortho Treatment**:

  - **General Note**: For information on the General Note window for generic notes, refer to the axiUm Reference Manual for EHR and see General Note Window (Generic) on page 99.

  - **General Note**: For information on the General Note window for notes associated to treatments, refer to the axiUm Reference Manual for EHR and see General Note Window (Treatments) on page 102.

  - **Template Note**: For information on the Template Note window for generic notes, refer to the axiUm Reference Manual for EHR see Template Note Window (Generic) on page 185.

  - **Template Note**: For information on the Template Note window for notes associated to treatments, refer to the axiUm Reference Manual for EHR see Template Note Window (Treatments) on page 188.

  - **SOAP Note**: For information on the SOAP Note window for either generic notes or notes associated to treatments, refer to the axiUm Reference Manual for EHR and see SOAP Note Window on page 182.

Clicking this icon permanently deletes the selected item from the list view.
**PERIO TX HISTORY WINDOW**

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="print_report.png" alt="Print Report" /></td>
<td>Clicking this icon prints the <em>Electronic Health Record - Tx History</em> report to the default printer.</td>
</tr>
<tr>
<td><img src="estimate.png" alt="Estimate" /></td>
<td>Clicking this icon displays the <em>Select Planned Treatments</em> window. For information on the <em>Select Planned Treatments</em> window, refer to the axiUm Reference Manual for EHR and see <em>Select Planned Treatments Window</em> on page 168.</td>
</tr>
<tr>
<td><img src="add_patient_tx_consent.png" alt="Add Patient Tx Consent" /></td>
<td>Clicking this icon displays the <em>Add Patient Consent</em> window.</td>
</tr>
<tr>
<td><img src="options_settings.png" alt="Options/Settings" /></td>
<td>Clicking this icon displays the <em>Tx History Options</em> window. For information on the <em>Tx History Options</em> window, see <em>Tx History Options Window</em> on page 34.</td>
</tr>
</tbody>
</table>

**[text colors]** Each record is displayed differently according to the type of record and its status:

- **Black**: Approved treatment and/or approved clinical notes.
- **Black with strike-out line**: Treatment and/or clinical notes that have been deleted internally by axiUm. (For example as treatment moves from planned to completed axiUm strikes out the planned line and adds a new line for the completed treatment).
- **Blue**: Un-approved treatment and/or un-approved clinical notes.
- **Green**: Appointment or recall information line.
- **Gray with strike-out line**: Deleted line.

**Add Tx Note...** This right-click option is enabled if the highlighted item in the list view is a treatment record.

Selecting this right-click option displays the *Select Note Type* window. For information on the *Select Note Type* window, refer to the axiUm Reference Manual for EHR and see *Select Note Type Window* on page 166.

**Edit Tx Note...** This right-click option is enabled if the highlighted item in the list view is a note record.

Selecting this right-click option displays one of the following windows depending on the type of note record highlighted in the list view:

- **General Note**: For information on the *General Note* window for generic notes, refer to the axiUm Reference Manual for EHR and see *General Note Window (Generic)* on page 99.
- **General Note**: For information on the *General Note* window for notes associated to treatments, refer to the axiUm Reference Manual for EHR and see *General Note Window (Treatments)* on page 102.
- **Template Note**: For information on the *Template Note* window for generic notes, refer to the axiUm Reference Manual for EHR see *Template Note Window (Generic)* on page 185.
- **Template Note**: For information on the *Template Note* window for notes associated to treatments, refer to the axiUm Reference Manual for EHR see *Template Note Window (Treatments)* on page 188.
- **SOAP Note**: For information on the *SOAP Note* window for either generic notes or notes associated to treatments, refer to the axiUm Reference Manual for EHR and see *SOAP Note Window* on page 182.
**PERIO TX HISTORY WINDOW**

**Add/Edit Tx Form...**
This right-click option is enabled if the highlighted item in the list view is a treatment record.

Selecting this right-click option displays the *Treatment EPR Forms* window.

**Add Lab...**
This right-click option is enabled if the highlighted item in the list view is a treatment record that requires a lab order.

Selecting this right-click option displays the *Lab Procedure Selection* window. For information on the *Lab Procedure Selection* window, refer to the axiUm Reference Manual for EHR and see *Lab Procedure Selection Window* on page 112.

**Edit Lab Order...**
This right-click option is enabled if the highlighted item in the list view is a lab order.

Selecting this right-click option displays the *Lab Order Details* window.

**Complete Treatments**
This right-click option is enabled if the highlighted item in the list view is a treatment record with a status of Planned or In Process.

Selecting this right-click option displays the *Complete Treatment Review* window. For information on the *Complete Treatment Review* window, refer to the axiUm Reference Manual for EHR and see *Complete Treatment Review Window* on page 16.

**In Process Tx Visit**
This right-click option is enabled if the highlighted item in the list view is a treatment record with a status of Planned or In-Process.

Selecting this right-click option displays the *In Process Treatment Review* window. For information on the *In Process Treatment Review* window, refer to the axiUm Reference Manual for EHR and see *In Process Treatment Review Window* on page 104.

**Assign Phase/Seq...**
This right-click option is enabled if the highlighted item in the list view is a treatment record with a status of Planned.

Selecting this right-click option displays the *Assign Phase/Seq* window. For information on the *Assign Phase/Seq* window, refer to the axiUm Reference Manual for EHR and see *Assign Phase/Seq Window* on page 9.

**Medical Information...**
This right-click option is enabled if the highlighted item in the list view is a treatment record with a status of Completed.

Selecting this right-click option displays the *Tx Medical Information* window. For information on the *Tx Medical Information* window, refer to the axiUm Reference Manual for EHR and see *Tx Service Information Window* on page 226.

**Tx Consent History...**
This right-click option is enabled if the highlighted item in the list view is a treatment record.

Selecting this right-click option displays the *Tx Consent History* window. For information on the *Tx Consent History* window, refer to the axiUm Reference Manual for EHR and see *Tx Consent History Window* on page 221.

**Print Labels...**
This right-click option is enabled if the highlighted item in the list view is a lab order.

Selecting this right-click option print the lab order labels to the default printer.

**Add Student Eval...**
Selecting this right-click option displays the *Add/Edit Evaluation* window.
### Perio Tx History Window

**Follow up visit**

This right-click option is enabled if:

- The patient is using NY Medicaid insurance.
- The item highlighted in the list view is a NY Medicaid claim.
- The item highlighted in the list view is a treatment with status Complete.

Selecting this right-click option indicates that a follow-up visit occurred for this NY Medicaid patient. axiUm updates this record to be a strikeout and adds a new completed treatment for the current date. axiUm updates the provider using the current provider ID, if defined, otherwise it will use the same provider ID as the original treatment.

**Re-activate Treatment**

This option is enabled if the highlighted record is an inactive treatment. Treatment records can become automatically inactive based on the settings indicated in the Practice Options window’s Transactions Options section’s Treatment Tx Status considered inactive section.

Selecting this right-click option re-activates the selected inactive treatment record. Re-activated treatment records default to the treatment status indicated in the Practice Options window’s Transactions Options section’s Treatment Tx Status considered inactive section.

For information on the Practice Options window’s Transactions Options section, refer to the axiUm Reference Manual for Maintenance and see Transactions Options Section on page 475.

**Redo Step Treatment**

This right-click option is enabled if the highlighted item in the list view is a treatment record of status In Process and is also a step procedure.

Selecting this right-click option creates a duplicate record of the completed treatment in the list view.

**Resolve Condition...**

This right-click option is enabled if the highlighted item in the list view is a condition record.

Selecting this right-click option indicates that the condition is resolved, and removes the record from the list view.
PERIO TX HISTORY WINDOW

View Details... This right-click option is enabled if the highlighted item in the list view is a treatment record or a note record.

Selecting this right-click option displays one of the following windows depending on the type of record highlighted in the list view:

- **View Treatment window.** For information on the View Treatment window, refer to the axiUm Reference Manual for EHR and see View Treatment Window on page 245.

- **View General Note:** This window is displayed if the highlighted item contains a general note for generic use. For information on the View General Note window for generic use, refer to the axiUm Reference Manual for EHR and see View General Note Window (Generic) on page 236.

- **General Note:** This window is displayed if the highlighted item contains a general note associated to a treatment. For information on the General Note window, refer to the axiUm Reference Manual for EHR and see General Note Window (Treatments) on page 102.

- **View Template Note:** This window is displayed if the highlighted item contains a template note for generic use. For information on the View Template Note window, refer to the axiUm Reference Manual for EHR and see View Template Note Window (Generic) on page 242.

- **View Template Note:** This window is displayed if the highlighted item contains a template note associated to a treatment. For information on the View Template Note window, refer to the axiUm Reference Manual for EHR and see View Template Note Window (Treatment) on page 243.

- **View SOAP Note:** This window is displayed if the highlighted item contains a SOAP note. For information on the View SOAP Note window, refer to the axiUm Reference Manual for EHR and see View SOAP Note Window on page 241.

View Treatment... This right-click option is enabled if the highlighted item in the list view is a treatment with a note associated to it.

Selecting this right-click option displays the View Treatment window for the treatment associated to the highlighted note record. For information on the View Treatment window, refer to the axiUm Reference Manual for EHR and see View Treatment Window on page 245.
**PERIO TX HISTORY WINDOW**

**View Treatment Note...**

This right-click option is enabled if the highlighted item in the list view is a note record.

Selecting this right-click option displays one of the following windows depending on the type of note record highlighted in the list view:

- **General Note**: This window is displayed if the highlighted item contains a general note associated to a treatment. For information on the General Note window, refer to the axiUm Reference Manual for EHR and see General Note Window (Treatments) on page 102.

- **View Template Note**: This window is displayed if the highlighted item contains a template note associated to a treatment. For information on the View Template Note window, refer to the axiUm Reference Manual for EHR and see View Template Note Window (Treatment) on page 243.

- **View SOAP Note**: This window is displayed if the highlighted item contains a SOAP note. For information on the View SOAP Note window, refer to the axiUm Reference Manual for EHR and see View SOAP Note Window on page 241.

**View Appointment...**

This right-click option is enabled if the highlighted item in the list view is a treatment that is associated with an appointment.

Selecting this right-click option displays:

- The Scheduler window and the Patient Appointments window. For information on the Patient Appointments window, refer to the axiUm Reference Manual for Scheduler and see Patient Appointments Window on page 130.

- The Scheduler window and the Family Appointments. For information on the Family Appointments window, refer to the axiUm Reference Manual for Scheduler and see Family Appointments Window on page 88.

- Appointment Request window: For information on the Appointment Request window, refer to the axiUm Reference Manual for Scheduler and see Appointment Request Window on page 50.

- Edit Planned Appointment window: For information on the Edit Planned Appointment window, refer to the axiUm Reference Manual for Scheduler and see Edit Planned Appointment Window on page 77.

**Add Appt Request...**

This right-click option is enabled if the highlighted item in the list view is a planned or in-process treatment.

Selecting this right-click option displays the New Appointment Request window. For information on the New Appointment Request window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see New Appointment Request Window on page 54.
**PERIO TX HISTORY WINDOW**

<table>
<thead>
<tr>
<th>Make Appointments...</th>
<th>This right-click option is enabled if the highlighted item in the list view is a planned or in-process treatment.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Selecting this right-click option displays the Scheduler window's Active tab and also the New Appointment window.</td>
</tr>
<tr>
<td></td>
<td>For information on the Scheduler window's Active tab, refer to the axiUm Reference Manual for Scheduler and see Scheduler Window - Active Tab on page 165.</td>
</tr>
<tr>
<td></td>
<td>For information on the New Appointment window, refer to the axiUm Reference Manual for Scheduler and see New Appointment Window on page 99.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Add Planned Appt...</th>
<th>This right-click option is enabled if the highlighted item in the list view is a planned or in-process treatment.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Selecting this right-click option displays the New Planned Appointment window. For information on the New Planned Appointment window, refer to the axiUm Reference Manual for Scheduler and see New Planned Appointment Window on page 108.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Patient Appointments</th>
<th>This right-click option will display if the Scheduler Options window's Patient/Family Appointments Window section's Mode drop-down field displays the Patient option. For information on the Scheduler Options window, refer to the axiUm Reference Manual for Maintenance and see Scheduler Options Window on page 845.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Selecting this right-click option displays the Patient Appointments window. For information on the Patient Appointments window, refer to the axiUm Reference Manual for Scheduler and see Patient Appointments Window on page 130.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Family Appointments</th>
<th>This right-click option will display if the Scheduler Options window's Patient/Family Appointments Window section's Mode drop-down field displays the Family option. For information on the Scheduler Options window, refer to the axiUm Reference Manual for Maintenance and see Scheduler Options Window on page 845.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Selecting this right-click option displays the Family Appointments window. For information on the Family Appointments window, refer to the axiUm Reference Manual for Scheduler and see Family Appointments Window on page 88.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Appointment Planning</th>
<th>This right-click option displays the Scheduler window and the Appointment Planning window.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>For information on the Scheduler window, refer to the axiUm Reference Manual for Scheduler and see Scheduler Window on page 151.</td>
</tr>
<tr>
<td></td>
<td>For information on the Appointment Planning window, refer to the axiUm Reference Manual for Scheduler and see Appointment Planning Window on page 47.</td>
</tr>
</tbody>
</table>

**12 Periodontics - Comparison View Window (Graphic)**

You can access this window by going to the Periodontics Comparison Settings window, and going to the Show section and selecting the Graph Differentials option, and then clicking the Accept button. For information on the Periodontics Comparison Settings window, see
Use this window to view and print perio record comparisons. For each of the dates selected, axiUm displays the value entered on that date. The last row shows the amount of change between the selected dates, and the chart uses bar graphs to display the amount of change.

### Periodontics - Comparison View Window (Graphic)

<table>
<thead>
<tr>
<th>Patient</th>
<th>This static field displays the selected patient’s name.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Condition</td>
<td>This static field displays the condition you are comparing, as selected in the Periodontics Comparison Settings window’s Condition drop-down field. For information on the Periodontics Comparison Settings window, see Periodontics Comparison Settings Window on page 30.</td>
</tr>
<tr>
<td>Print</td>
<td>Clicking this button prints the displayed perio comparison to the default printer.</td>
</tr>
</tbody>
</table>

### 13 Periodontics - Comparison View Window (Text)

You can access this window by going to the Periodontics Comparison Settings window, and going to the Show section and selecting the Text Comparisons option, and then clicking the Accept button. For information on the Periodontics Comparison Settings window, see Periodontics Comparison Settings Window on page 30.

Use this window to view and print perio record comparisons. For each of the dates selected, axiUm displays the value entered on that date. The last row shows the amount of change between the dates.
You can access this window by clicking (Compare Form) in the Perio Chart window. For information on the Perio Chart window, see Perio Chart Window on page 9.

Use this window to define perio comparison settings.
**PERIODONTICS COMPARISON SETTINGS WINDOW**

| Condition | This drop-down field indicates the perio condition you can compare.  
Access to these perio conditions are defined in the *Periodontal Display Options* window. For information on the *Periodontal Display Options* window, refer to the axiUm Reference Manual for Maintenance and see *Periodontal Display Options Window* on page 672. |
|———|———|
| Show | This section determines the display mode of the perio comparison.  
This section displays the following options:  
• Graph Differentials: This option, if selected, indicates to compare the selected perio records using graphs.  
• Text Comparisons: This option, if selected, indicates to compare the selected perio records using entered text values. |
| Display | This section indicates the dates of the selected perio records to use in the *Periodontics - Comparison View* window.  
This section displays Date 1–2 drop-down fields. These drop-down fields indicate the dates of the perio records selected for comparison.  
The number of enabled fields correspond to the number of historic perio records that exist for the selected patient. For example, if there are only two historic perio records for the selected patient, only the Date 1 drop-down field and the Date 2 drop-down field are enabled.  
Each field is associated to a color. You can change this. Clicking on the color field displays the Color window. |
| Accept | Clicking this button applies your selection, closes the *Periodontics Comparison Settings* window, and displays one of the following windows:  
• *Periodontics - Comparison View* window (graphic): This window displays if the Show section has the Graph Differentials option selected. See Show in this table.  
• *Periodontics - Comparison View* window (text): This window displays if the Show section has the Text Comparisons option selected. See Show in this table. |
| Cancel | Clicking this button cancels any selection and closes the *Periodontics Comparison Settings* window. |
15 Select Perio Date Window

You can access this window by clicking (View Form History) on the Perio Chart window. For information on the Perio Chart window, see *Perio Chart Window* on page 9.

Use this window to select a perio history record for further actions.

![Select Perio Date Window](image)

**Select Perio Date Window**

<table>
<thead>
<tr>
<th>Select Perio Condition</th>
<th>This drop-down field indicates to display records containing any readings for the selected perio condition.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>The options in the drop-down field are defined in the <em>Periodontal Conditions</em> window. For information on the <em>Periodontal Conditions</em> window, refer to the axiUm Reference Manual for Maintenance and see <em>Periodontal Conditions Window</em> on page 665.</td>
</tr>
<tr>
<td></td>
<td>For example, if this drop-down field displays <em>Plaque</em>, axiUm displays only those records containing entries for plaque reading.</td>
</tr>
<tr>
<td>Show All</td>
<td>Selecting this checkbox displays all records in the list view, including those closed off.</td>
</tr>
<tr>
<td></td>
<td>Closed off records are displayed in gray text.</td>
</tr>
</tbody>
</table>
### SELECT PERIO DATE WINDOW

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select</td>
<td>Clicking this button displays the Perio Chart window for the selected perio history record.</td>
</tr>
<tr>
<td>Cancel</td>
<td>Clicking this button loses the Select Perio Date window.</td>
</tr>
<tr>
<td>New</td>
<td>This button is shown if you opened this window through the Select Perio Date window.</td>
</tr>
<tr>
<td></td>
<td>Clicking this button displays the Add Perio window to start a new perio exam without resuming from a previous one displayed in the list view. For information on the Add Perio window, see Add Perio Window on page 1.</td>
</tr>
<tr>
<td>Resume</td>
<td>This button is shown if you opened this window through the Select Perio Date window.</td>
</tr>
<tr>
<td></td>
<td>Clicking this button displays the Add Perio window. For information on the Add Perio window, see Add Perio Window on page 1.</td>
</tr>
<tr>
<td>Edit/Review</td>
<td>This button is enabled if the selected perio record is an incomplete perio exam. Only those incomplete perio exams that have not yet been approved can be edited.</td>
</tr>
<tr>
<td>Close Off</td>
<td>Clicking this button closes off an incomplete chart. Once a record is closed off, you cannot edit it.</td>
</tr>
<tr>
<td></td>
<td>Closed off records are grayed out and deleted from the list view. axiUm adds a new record in the list with today's date in the Audit Date column.</td>
</tr>
<tr>
<td>Reopen</td>
<td>Clicking this button will undo a closed-off chart so you can edit it.</td>
</tr>
<tr>
<td></td>
<td>axiUm adds a new record in the list with today's date in the Audit Date column.</td>
</tr>
</tbody>
</table>

---

### Show Perio Status History Window

You can access this window by going to the Perio EPR Forms window, going to the Medical Alerts section or the list view, and selecting the Show Perio Status History right-click option. For information on the Perio EPR Forms window, see Perio EPR Forms Window on page 10.

Use this window to view the history of the selected perio record’s status changes.
SHOW PERIO STATUS HISTORY WINDOW

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patient</td>
<td>This static field indicates the name and chart number of the selected patient.</td>
</tr>
<tr>
<td>Perio Type</td>
<td>This drop-down field indicates the perio classification of the selected patient. The options in this drop-down field are defined in the Periodontal Patient Types window. For information on the Periodontal Patient Types window, refer to the axiUm Reference Manual for Maintenance and see Periodontal Patient Types Window on page 685.</td>
</tr>
<tr>
<td>Prognosis</td>
<td>This drop-down field indicates the perio prognosis of the selected patient. The options in this drop-down field are defined in the Periodontal Prognosis window. For information on the Periodontal Prognosis window, refer to the axiUm Reference Manual for Maintenance and see Periodontal Prognosis Window on page 687.</td>
</tr>
<tr>
<td>PSR</td>
<td>This section indicates the PSR scores for the selected patient.</td>
</tr>
</tbody>
</table>

17 Tx History Options Window

You can access this window by going to the Perio Tx History window and clicking (Options/Settings). For information on the Perio Tx History window, see Perio Tx History Window on page 20.

Use this window to set up display settings for the Perio Tx History window.
**TX HISTORY OPTIONS WINDOW**

**Tx Status (Displayed in List)** This section indicates treatment records (of specific statuses) to display on the *Tx History Options* window, and contains the following checkboxes:

- PreExisting
- Conditions
- Planned
- In Process
- Completed
- Ortho Visits

**Display Disciplines** This list box indicates which treatments with disciplines to display in the *Tx History Options* window.

The options in this list box are defined in the *Treatment Disciplines* window. For information on the *Treatment Disciplines* window, refer to the axiUm Reference Manual for Maintenance and see *Treatment Disciplines Window* on page 90.

**Selection Options** This section indicates additional optional displays:

- **Phase**: This section displays the range of phases you want to display. For example, entering to display between phases 1 to 5 will display only those records containing phases in this range. Records with no assigned phases, or phases containing alpha characters (e.g. A, B, and C) will not display in the *Tx History Options* window.

- **Date**: This section displays the date range for the historic list of records you want to display. Selecting the checkboxes enables the associated fields. For example, entering to display between 30 and 0 days ago will display only those records in the past month (i.e. in the last 30 days).
TX HISTORY OPTIONS WINDOW

Display Options

This section indicates record types to display in the Tx History Options window, and contains the following checkboxes:

• **Show strike-out lines**: This checkbox, if selected, indicates to display treatment records and clinical records that have been deleted internally by axiUm. For example, as a treatment status changes from planned to completed, axiUm strikes out the planned line and adds a new line for the completed treatment.

• **Show deleted lines**: This checkbox, if selected, indicates to display deleted records.

• **Show notes**: This checkbox, if selected, indicates to display note records. Selecting this checkbox enables the **Show full notes** checkbox and the **Hide notes by module** checkbox. Selecting this checkbox automatically selects the **Sort treatment notes under each treatment** checkbox. For more information, see Sort treatment notes under each treatment in this table.

• **Show full notes**: This checkbox is enabled if the **Show notes** checkbox is selected. This checkbox, if selected, indicates to display details of notes.

• **Hide notes by module**: This checkbox, if selected, indicates to show only those notes entered in the EHR module. Any notes entered in other modules (e.g. Perio Chart module) will be hidden.

• **Show treatment forms**: This checkbox, if selected, indicates to display form records in the list view.

• **Show steps (I & C)**: This checkbox, if selected, indicates to display step treatments with in-process status or completed status. Step treatments with planned status are always displayed.

• **Show appointments**: This checkbox, if selected, indicates to display general appointments (not recalls).

• **Show recalls**: This checkbox, if selected, indicates to display recall appointments.

• **Show Appr User credentials**: This checkbox, if selected, indicates to display the approval user’s credentials, as entered in the Credentials field of the Users window’s Personal tab’s Name/Address section. For information on the Personal tab’s Name/Address section, refer to the axiUm Reference Manual for Maintenance and see Name/Address Section on page 533.

Hide Columns

This list box indicates the column headings to hide in the Tx History Options window.

There are four custom fields displayed in this list box that you can define in the Custom Fields window using the Treatment (Clinical) fields. For information on the Custom Fields window, refer to the axiUm Reference Manual for Maintenance and see Custom Fields Window on page 9.

All other column headings are hard-coded and are not user-defined.
### Tx History Options Window

#### Sort Options
This section indicates the sorting criteria for the records displayed in the *Perio Tx History* window.

- **Primary:** This drop-down field indicates the primary sort order.
- **Secondary:** This drop-down field indicates the second sort order.
- **Tertiary:** This drop-down field indicates the third sort order.

There are two custom fields displayed in the drop-down fields that you can define in the *Custom Fields* window using the *Treatment (Clinical)* fields. For information on the *Custom Fields* window, refer to the axiUm Reference Manual for Maintenance and see *Custom Fields Window* on page 9.

<table>
<thead>
<tr>
<th>Sort planned activity to the end of the list:</th>
<th>This checkbox, if selected, indicates to group all planned treatments at the bottom of the list view.</th>
</tr>
</thead>
</table>
| Sort treatment notes under each treatment   | This checkbox, if selected, indicates that treatment note records appear below the associated treatment record.  

This checkbox is automatically selected if the *Show notes* checkbox in the *Display Options* section is selected. For information, see *Display Options* in this table.  

This checkbox, if deselected, indicates that axiUm sorts the treatment note record based on the setup indicated in the *Sort Options* section, regardless whether or where the associated treatment is displayed in the list. |
| Show appointments’ treatments               | This checkbox, if selected, displays planned treatment records below the associated planned appointment record. If a planned treatment is associated to multiple appointments, axiUm displays the planned appointment record below all associated appointment records.  

This checkbox, if deselected, displays planned treatment records based on the setup indicated in the *Sort Options* section, regardless whether or where the associated planned treatment is displayed in the list. |
| Include Station View                        | This checkbox, if selected, indicates to include the station view as a view option in the *Perio Tx History* window. |
| Save as Station Default                     | Clicking this button saves the settings in this tab as your workstation default. These new settings will remain the next time you log on to axiUm. |