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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 Personal Planner windows.
- Use the fields and options in the Personal Planner window.

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:

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

- **Important information or steps you must take.** For example, if you do not complete this step you may be unable to complete a task later on.

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

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

This chapter defines all the interactive screen elements in the Personal Planner module, such as:

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

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

You can access this window by:

- Clicking (Personal Planner) from the axiUm main screen icons.
- Clicking the Personal Planner option from the Actions menu.
- Clicking (Personal Planner) from the Desktop.

This is the main Patient Planner module window.
PERSONAL PLANNER WINDOW

🔍 Search for Data
This icon is available in all tabs. Clicking this icon starts the search process.

🔥 Create a new Record
This icon is available in the Appointments tab, Chart Requests tab, Patient Needs tab, Dispensary tab, Lab Orders tab, and Assigned Forms tab.
Clicking this icon displays the associated blank window for entering new information. For example, if you are in the Appointments tab, clicking this icon displays a blank Rolodex (Select Patient) window to add a new appointment for a patient.

✍️ Edit Record
This icon is available in the Appointments tab, Lab Orders tab, and Assigned Forms tab.
Clicking this icon displays the associated window containing details of the item selected from the list view. For example, if you are in the Appointments tab and you highlight an ortho appointment, clicking this icon displays the Ortho Appointment Request window.

🔥 Delete Record
This icon is available in the Appointments tab, Chart Requests tab, Patient Needs tab, and Dispensary tab.
Clicking this icon permanently deletes the item selected from the list view.

🖨️ Print Report
This icon is available in all tabs.
Clicking this icon prints the associated report to the default printer. For example, if you are in the Chart Requests tab, clicking this icon prints the Chart Requests report.

話し
This icon is available in all tabs.
Clicking this icon displays the User Forms window and the Add Form window to select a form for the highlighted user in the list view.
# Personal Planner Window

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Clinic Time Exception" /></td>
<td>This icon is available in all tabs. Clicking this icon displays the Provider Non-Clinic Times window. For information on the Provider Non-Clinic Times window, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see Provider Clinic Time Exceptions Window on page 821.</td>
</tr>
</tbody>
</table>

### Provider

Criteria defined is used to search for the provider ID.

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

When you select a provider ID, axiUm updates the User field with the last name and first name of the associated provider ID.

### User

This read-only field indicates the last name and first name of the axiUm user associated to the provider number in the Provider field.

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

When you select a different user name, axiUm updates the Provider field with the provider ID of the associated user name.

### Date From

This search field indicates the starting date range for the search.

### Date To

This search field indicates the ending date range of the search.

### Include Group Assignments

This checkbox is available if the Assigned Forms tab is selected. For information on the Personal Planner window's Assigned Forms tab, see Personal Planner Window - Assigned Forms Tab on page 9.

This checkbox, if selected, searches for forms assigned to a Messenger group in which the provider displayed in the Provider field belong.

### Include User's Previous Assignments

This checkbox is available if the Assigned Forms tab is selected. For information on the Personal Planner window's Assigned Forms tab, see Personal Planner Window - Assigned Forms Tab on page 9.

This checkbox, if selected, searches for forms previously assigned to the provider displayed in the Provider field belongs.

### Show Open Forms Only

This checkbox is available if the Assigned Forms tab is selected. For information on the Personal Planner window's Assigned Forms tab, see Personal Planner Window - Assigned Forms Tab on page 9.

This checkbox, if selected, searches for forms assigned specifically to the provider displayed in the Provider field belong.
1.1 Personal Planner Window - Unapproved Tab

When you open the Personal Planner window, this is the default tab. This tab displays unapproved items that match your search criteria. For example, unapproved treatments, unapproved forms, and unapproved notes.

PERSONAL PLANNER WINDOW - UNAPPROVED TAB

**Approve Item**
This right-click option, if selected, opens the associated approval window. For example, if the item you highlighted is an unapproved treatment, axiUm displays the Patient Approvals window.

**Select Patient**
This right-click option, if selected, selects or changes the current patient to the one associated to the item you highlighted.

1.2 Personal Planner Window - Assigned Pts Tab

This tab displays patient assignments that match your search criteria.
1.3 Personal Planner Window - Appointments Tab

This tab displays appointment records that match your search criteria.

Note that different colored lines display for ortho requests and appointment requests. The colors depend on the logged on user.

| Request Chart-Out | This right-click option, if selected, displays the Request Chart-Out window. For information on the Request Chart-Out window, refer to the axiUm Reference Manual for Rolodex & Patient Card and see Request Chart-Out Window on page 150. |
| Select Patient | This right-click option, if selected, selects or changes the current patient to the one associated to the item you highlighted. |

**PERSONAL PLANNER WINDOW - APPOINTMENTS TAB**

<table>
<thead>
<tr>
<th>SLP</th>
<th>Type</th>
<th>Pri Chart</th>
<th>Pri Name</th>
<th>Pri Date</th>
<th>Time</th>
<th>Clinic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Disabled</td>
<td>242</td>
<td>Doe, Jane</td>
<td>1/11/2008</td>
<td>10:00 AM</td>
<td>Main Clinic</td>
<td></td>
</tr>
<tr>
<td>Disabled</td>
<td>263</td>
<td>Doe, Jane</td>
<td>3/12/2008</td>
<td>10:00 AM</td>
<td>Main Clinic</td>
<td></td>
</tr>
<tr>
<td>Archive</td>
<td>265</td>
<td>Doe, John</td>
<td>3/12/2008</td>
<td>09:00 AM</td>
<td>Oral Maxillofacial</td>
<td></td>
</tr>
<tr>
<td>Deleted</td>
<td>266</td>
<td>Doe, Jane</td>
<td>3/20/2009</td>
<td>04:30 PM</td>
<td>Oral Maxillofacial</td>
<td></td>
</tr>
<tr>
<td>Deleted</td>
<td>268</td>
<td>Doe, Jane</td>
<td>3/16/2008</td>
<td>08:00 AM</td>
<td>Oral Maxillofacial</td>
<td></td>
</tr>
<tr>
<td>Deleted</td>
<td>269</td>
<td>Doe, Jane</td>
<td>3/25/2009</td>
<td>09:00 AM</td>
<td>Oral Maxillofacial</td>
<td></td>
</tr>
<tr>
<td>Deleted</td>
<td>268</td>
<td>Doe, Jane</td>
<td>3/25/2009</td>
<td>10:00 AM</td>
<td>Oral Maxillofacial</td>
<td></td>
</tr>
<tr>
<td>Checked Out</td>
<td>268</td>
<td>Doe, Jane</td>
<td>3/25/2009</td>
<td>09:00 AM</td>
<td>Oral Maxillofacial</td>
<td></td>
</tr>
</tbody>
</table>

**PERSONAL PLANNER WINDOW - APPOINTMENTS TAB**

| Appointment Treatments | This right-click option, if selected, opens the Appointment Treatments window so that treatments can be associated to the appointment selected. |
| Go To Appointment... | This right-click option, if selected, opens the Scheduler module and displays the Patient Appointments window for the patient associated with the item you highlighted. |
| Select Patient | This right-click option, if selected, selects or changes the current patient to the one associated to the item you highlighted. |
| Show History... | This right-click option, if selected, displays the Appointment History window for the appointment associated with the item you highlighted. |
1.4 Personal Planner Window - Chart Requests Tab

This tab displays chart requests that match your search criteria.

<table>
<thead>
<tr>
<th>Unapproved</th>
<th>Assigned Patient</th>
<th>Appointments</th>
<th>Chart Requests</th>
<th>Patient Needs</th>
<th>Overdue Flts</th>
<th>Dispensary</th>
<th>Lab Orders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pt: 2284</td>
<td>Doe, Jane</td>
<td>12/06/2020</td>
<td>11:54 AM</td>
<td>Daniel Public Health</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Select Patient This right-click option, if selected, selects or changes the current patient to the one associated to the item you highlighted.
1.5 Personal Planner Window - Pt Needs Tab

This tab displays overdue appointments that match your search criteria.

![Image of Personal Planner Window - Pt Needs Tab]

**PERSONAL PLANNER WINDOW - PATIENT NEEDS TAB**

Select Patient  This right-click option, if selected, selects or changes the current patient to the one associated to the item you highlighted.

1.6 Personal Planner Window - Overdue Pts Tab

This tab displays overdue patients that match your search criteria.

![Image of Personal Planner Window - Overdue Pts Tab]
1.7 Personal Planner Window - Dispensary Tab

This tab displays dispensary requests that match your search criteria.

1.8 Personal Planner Window - Lab Orders Tab

This tab displays lab orders that match your search criteria. Unapproved lab order records are displayed in blue text.
1.9 Personal Planner Window - Assigned Forms Tab

This tab displays forms assigned to you or your group.

Unapproved, assigned lab forms are displayed in blue text.

<table>
<thead>
<tr>
<th>Unapproved</th>
<th>Assigned</th>
<th>Forms</th>
<th>Chart Requests</th>
<th>5 Weeks</th>
<th>Overdue</th>
<th>Dispensary</th>
<th>Lab Orders</th>
<th>Assigned Forms</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chart #</td>
<td>Name</td>
<td>Form #</td>
<td>Date</td>
<td>Description</td>
<td>Status</td>
<td>Assigned To</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**PERSONAL PLANNER WINDOW - ASSIGNED FORMS TAB**

<table>
<thead>
<tr>
<th>Select Patient</th>
<th>This right-click option, if selected, selects or changes the current patient to the one associated to the item you highlighted.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit Form Information</td>
<td>This right-click option, if selected, displays the Edit Form Information window. For information on the Edit Form Information window, refer to the axiUm Reference Manual for Rolodex &amp; Patient Card and see Edit Form Information Window on page 33.</td>
</tr>
<tr>
<td>View Form Events</td>
<td>This right-click option, if selected, displays the View Form Events window.</td>
</tr>
<tr>
<td>Re-assign Forms</td>
<td>This right-click option, if selected, displays the Re-assign Forms window.</td>
</tr>
</tbody>
</table>