Contents
axiUm Release 6.02.00 ......................................................................................... 1
Chart Tracker ................................................................................................. 1
AX-1846: Configure chart locks to use SQL functions .............................. 1
AX-1963: New timer for chart lock warnings & errors ............................... 5
EHR .............................................................................................................. 7
AX-660: Ability to hide inactive treatments .............................................. 7
AX-1663: Drug fields with intellisense functionality ................................ 11
AX-1825: Additional controls for accessing EPR forms ............................ 11
AX-1948: Ability to prevent users from adding step treatments .............. 12
AX-1973: Ability to make tags in template notes mandatory to enter ......... 13
General ....................................................................................................... 15
AX-963: Optional ability to log on using Active Directory credentials .......... 15
AX-1665: Define Start Check time before the scheduled appointment ....... 18
AX-2340: Additional information accessible on the status bar indicator .... 20
Info Manager ............................................................................................... 23
AX-968: Additional fields in the Patient List report ................................... 23
AX-1605: New calculated fields ................................................................. 24
Maintenance ............................................................................................... 24
AX-647: Ability to set family out-of-pocket maximum ............................... 24
AX-1521: Ability to launch a specific Infinit application .......................... 25
AX-1813: Ability to enter apostrophes & dashes in user names ............... 27
Messenger ................................................................................................. 27
AX-881: Notify patients when messages are sent ...................................... 27
Ortho Manager ........................................................................................... 29
AX-1660: Ability to select default window to display ............................... 29
Rolodex ...................................................................................................... 31
AX-2514/2523: Longer fields for patient name entry/display .................... 31
Scheduler ................................................................................................. 31
AX-680: Viewing appointments of logged-on user only ............................ 31
AX-1175: Ability to search for chairs stamped as “No Discipline” ............ 33
AX-1176: Ability to retain previously selected discipline ....................... 34
AX-1494: Booking in multiple clinics ....................................................... 34
AX-1604: Appointment Expert window indicates overflow chairs .......... 34
Transactions ............................................................................................. 36
AX-1130: Riders & site-specific coverages for NY Medicaid .................... 36
AX-1474: Display indicator if EOB files exist in treatment records .......... 36
AX-1517: Ability to send X-ray procedures to Xelis ................................. 37
AX-2098: Integration with VixWin ............................................................. 38
axiUm Release 6.02.01 .................................................................................. 40
General ....................................................................................................... 40
AX-2525: Longer fields for patient name entry/display ............................ 40
Scheduler ................................................................................................. 40
AX-2832: Ability to suppress Shared Reserve Warning window ............... 40
Transactions ............................................................................................. 42
AX-2180: Bill the amount of patient charge for dual WDE insurance ....... 42
axiUm Release 6.02.02 .................................................................................. 43
EHR ............................................................................................................. 43
AX-2845: Ability to send in-process X-ray procedures to Xelis ................. 43
AX-3195: Approve in-process treatments in Xelis .................................... 43
General ....................................................................................................... 43
AX-2981: Increased size of the Set axiUm Default window ................................................. 43

axiUm Release 6.02.03 ............................................................................................................. 44

General .................................................................................................................................... 44
AX-2959: Crystal Reports now allows the display of long names ......................................... 44
AX-3094: Update copyright dates in axiUm to 2015 ................................................................. 44
AX-1846: Configure chart locks to use SQL functions

**Module:** Chart Tracker

**Issue:** Need axiUm to have the ability to apply chart locks (warnings & errors) based on SQL functions.

**Enhancement:** Now axiUm has the ability to apply chart locks (warnings & errors) based on SQL functions. This lets you apply multiple chart locks to each user. Currently, axiUm limits you to one warning and one error per user.

Note: Contact Custom Services to create an SQL Function that can be customized to meet your institution’s requirements.

**Setup:**

1. Open the Chart Tracking Locks window (changed).
   Go to Maintenance window - Office tab - Chart Tracking Locks icon.

![Chart Tracking Locks window](image)

The following fields are new:

- **Type:** This drop-down field displays the following options:
  - **Function:** Selecting this option indicates that this chart lock uses an SQL function. Selecting this option enables the Function field and the Return Value drop-down field.
  - **Built-in Conditions:** Selecting this option indicates that axiUm uses existing chart lock behavior (i.e. retains version 6.01 behavior).

- **Function:** This field indicates the SQL function for this chart lock.
• Return Value: This drop-down field displays the following options:
  
  o Text (Mapped): Selecting this option indicates that axiUm will display text (up to 3 characters). The text displayed is associated to a return value from the function (e.g. a value of 0/1 could be mapped to Yes/No or True/False). The text color and background color are customizable.

  o Text (Returned): Selecting this option indicates that axiUm will display the text returned by the function. The text color and background color are customizable.

2. Click (Clear Data).
   axiUm clears the fields.

3. Enter the fields and options. For our example, we will enter the following:
   
   • Type: Function
   • Function: SBI_LANGUAGE
   • Return Value: Text (Mapped)

4. Click (Add a new Record).
   axiUm adds the new record to the list view.
5. Click (Chart Tracking Lock Definitions). axiUm displays the Chart Tracking Locks - Function window (new).

Note: If the Type drop-down field displays the Built-in Conditions option, clicking this icon still displays the Chart Tracking Lock Definitions window.

6. Enter the fields and options. For our example, we will enter the following records:

   - 1, ENG
   - 2, SPA
7. Click [ ] (close).
   axiUm closes the Chart Tracking Locks - Function window and returns to the Chart Tracking Locks window.

8. Click [ ] (close).
   axiUm closes the Chart Tracking Locks window and returns to the Maintenance window.

You have successfully created a chart tracking lock using an SQL function.

Usage:

When you go to the Rolodex and select a patient whose language is indicated as ENG (English) or SPA (Spanish), axiUm displays the Electronic Chart Warning window.

Note: The timer ("Continue in...") shown at the bottom of this window is a new feature. This feature is explained in AX-1963.
**AX-1963: New timer for chart lock warnings & errors**

**Module:** Chart Tracker

**Issue:** Sometimes, users dismiss chart lock warnings and errors before they read the message. Need axiUm to have the ability to continue displaying these messages for a specified length of time to ensure that users read it.

**Enhancement:** Now axiUm has the ability to continue displaying chart lock warnings and errors for a defined length of time.

**Setup:**

1. Open the Users window.
   Go to Maintenance window - Office tab - Users icon - run a search - highlight a record - (Edit Record).

![Image of Users window]

2. Click on the Additional tab and go to the Charts section.

![Image of Charts section]

The following interface elements are new:

- **Display Chart Lock Dialogs Dismissal (new):** This checkbox, if selected, indicates to continue displaying warning and error messages for a specified amount of time.

- **by ___ seconds (new):** This field indicates the length of time axiUm displays the warning or error message before the user can close the window. The default value is 5. You can enter any value between 5 and 15.

3. From the Electronic Chart Locks section, select a warning or an error.

4. Enter the following:
5. Click the Save button.
axiUm saves the changes.

6. Click the Close button.
axiUm closes the Users window and returns to the Users List window.

7. Click (close).
axiUm closes the Users List window and returns to the Maintenance window.

Usage:

When you go to the Rolodex module and select a patient that triggers the warning we set up above, axiUm displays the Electronic Chart Lock warning window.

Note: If we set up an error, the Electronic Chart Lock Error window will display.

The timer will count down the number of seconds as set up above. Once the timer expires, axiUm displays the Yes and No buttons.
EHR

AX-660: Ability to hide inactive treatments

**Module:** EHR ~ EHR Options window

**Issue:** Need the ability to hide inactive treatment records to prevent providers from working on these treatments.

**Enhancement:** There is a Hide Inactive Treatments checkbox (new) in the following windows:

- EHR window - Tx History tab - (Options/Settings) - EHR Options window - Tx History tab - Display Options section:
- EHR window - Tx History tab - highlight an appointment-type record from the list view - Appointment Treatments right-click option - Appointment Treatments window:

- Maintenance window - EHR tab - Treatment History Views icon - Tx History Views window - Display Options section:
- Ortho Manager window - ![Ortho Treatment History] - Ortho Treatment History window - ![Options/Settings] - Tx History Options window - Display Options section:
- Perio Chart window - Perio Treatment History window - (Options/Settings) - Tx History Options window - Display Options section:
**AX-1663: Drug fields with intellisense functionality**

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

**Issue:** Currently, searching for medication requires several steps. For example, Patient Medication Entry window - (ellipsis) - Drug Definition List window - enter search criteria - (Search for Data).

Need the ability to enter the first few letters of a medication in the Patient Medication Entry window's Drug field and have axiUm display a list of matching search results.

**Enhancement:** Now axiUm has intellisense functionality in the Drug field of the following windows:

- Patient Medication Entry window
- Edit Patient Medication window

Intellisense entries apply to both the name and description. For example, entering z displays the following results:

- Acyclovir (Zovirax)
- Capsacin (Zostrix) 0.25%

![Patient Medication Entry window](image)

**AX-1825: Additional controls for accessing EPR forms**

**Module:** EHR - Forms tab

**Issue:** Need additional controls for accessing EPR forms.

**Enhancement:** The following new access rules have been introduced:

- EHR module, Perio module, Ortho module (Add/Edit Evaluation window for students), Patient Approval window (after approving treatment), Evaluations module (Unevaluated Txs tab):
  
  You cannot create new evaluation forms using read-only forms. This includes general and periodic evaluations (in Evaluations module only).

- New evaluations:
You cannot hold forms for instructor who have read-only access to these forms.

- Multi-form evaluations:
  Second (and proceeding) instructors have full access to the form for further grading.

- Evaluations module:
  You cannot edit, resume, or delete evaluation forms if the current instructor has read-only access.

- Editing/resuming existing evaluations (Evaluations module):
  You cannot change an instructor to one with read-only access. Also, you cannot hold evaluation forms for instructors who have read-only access to these forms.

- Self-evaluations:
  You cannot create new self-evaluation forms if either the provider or instructor has read-only access to these forms. Only those self-evaluation forms with full access for both will be displayed in the list view.

- Cumulative evaluations:
  Users with read-only access to grading forms of some existing cumulative evaluations for certain treatments will not be prompted to continue them. If there is one or more such evaluation form, axiUm displays the Cumulative Evaluations Access Warning window. Users can continue cumulative evaluations for which they have full access.

---

**AX-1948: Ability to prevent users from adding step treatments**

**Module:** EHR - Chart Add  
**Issue:** Need the ability to prevent users from manually adding step treatments.  
**Enhancement:** Now has the ability to prevent users from manually adding step treatments.

**Setup:**

1. Open the Users window.

2. Click the Clinical tab and go to the Clinical Options section.  
   The Add Step Tx (when non-provider) checkbox has changed to a drop-down field with the following options:

   - Manual only: Selecting this option lets this provider add step treatments manually.

   - Manual & Auto: Selecting this options lets this provider add steps treatments, both manually and automatically by axiUm (this behavior is the same as version 6.01).

   - Auto only: Selecting this option lets this provider add step treatments, but only if added automatically by axiUm. If you try entering a step treatment, axiUm displays the message, "Cannot manually add a step procedure".
3. Click the Provider tab and go to the Controls section. The Can Add Tx Steps checkbox has changed to a drop-down field with the same options as above:

- Manual only
- Manual & Auto
- Auto only

Usage:

When you enter treatments in the EHR, Ortho, Perio module, or Transactions module, axiUm follows the rules set up above.

AX-1973: Ability to make tags in template notes mandatory to enter

Module: EHR ~ Clinical Note Tag Information window

Issue: Need axiUm to have the ability to make specific questions in template notes mandatory to enter an answer. This prevents important entries from being missed.

Enhancement: Now you can indicate specific tags in a template note as a mandatory entry.

Setup:

1. Open to the Clinical Note Template window.
2. Select the Required checkbox (new).

3. Click the OK button.
   axiUm saves the changes.

Usage:

When you add a template note, axiUm displays the text "Required next to the required field in the Template Note window.
If you leave this tag blank, clicking the OK button displays the following message:

[Image of the message window]

General

AX-963: Optional ability to log on using Active Directory credentials

**Module:** Login  
**Issue:** Need the added ability to enter user Active Directory credentials when logging onto axiUm.  
**Enhancement:** Now axiUm has the added ability to enter user Active Directory credentials when logging onto axiUm.

**Setup:**

1. Open the Station Options window.
   
   Go to the Maintenance window - System tab - Stations icon - Station Codes window - (Station Options).
2. Go to General section - Office section - ActiveDir item.

3. In the Current Value field, enter 7 (new).
   Note: 7 = Prompt for Windows Logon or Swiped Logon (on same window).

4. Click (Modify Record).
   axiUm saves your changes.

5. Click (close).
   axiUm saves the entries, closes the Station Options window, and returns to the Station Codes window.

6. Click (close).
   axiUm closes the Station Codes window and returns to the Maintenance window.

You have successfully set up axiUm with the added ability to enter user Active Directory credentials during logon.

Logging on with the addition of Windows credentials:
1. Launch axiUm.
   axiUm displays the Windows Log On window.

2. Enter your Windows logon criteria.

3. Click the OK button.
   axiUm displays the User Log On window.

4. Enter your axiUm logon criteria.
   Alternatively, use your swipe card.

5. Click the OK button.
   axiUm displays the main axiUm window.

You have successfully logged on using the addition of Windows credentials.

Note: The same behavior occurs when you switch users.

Switching users with the addition of Windows credentials:

1. Go to the Tools menu and click the Switch User option.
   axiUm displays the Switch User window.
This window is different from the Switch User window for swapping logon users; this window displays fields for entering your Windows logon criteria.

2. Enter your Windows logon criteria.

3. Click the OK button.
   axiUm displays the Switch User window.

4. Enter your axiUm logon criteria.
   Alternatively, use your swipe card.

5. Click the OK button.
   axiUm switches logon users.

You have successfully switched users using the addition of Windows credentials.

---

**AX-1665: Define Start Check time before the scheduled appointment**

**Module:** General ~ Start Check

**Issue:** When you start check, the number of minutes allowed before an appointment is hard-coded in axiUm at 30 minutes. Need the ability to customize this time.

**Enhancement:** Now axiUm has the ability to do this.

**Setup:**

1. Open the Users window.
Go to Maintenance window - Office tab - Users icon - run s search - highlight a record - 
(Edit Record).

2. Click on the Provider tab and go to the Controls section.

3. Select the Requires Start Check checkbox.
   axiUm enables the __minutes before appt field (new) with the default value of 30.

4. In the __minutes before appt field (new), enter the number of minutes you want to allow this provider to start check prior to their appointment time.
   You can enter a value between 1 and 999.

5. Click the Save button.
   axiUm saves your changes.
AX-2340: Additional information accessible on the status bar indicator

Module: General ~ status bar

Issue: Need the ability to click on a status bar indicator and view detailed information. This help you gain more context about the selected status bar indicator.

Enhancement: Now the status bar displays the following additional information:

Setup:

1. Open the Status Bar Notifications window.
   Go to Maintenance window - System tab - Status Bar Notifications icon.

   ![Status Bar Notifications](image)

2. Enter the fields and options.

   Notes:

   - Make sure that the Notification Type drop-down field displays the Indicator option. Selecting this option enables the Status Bar Indicator Details (Optional) section (new).

   ![Status Bar Notifications](image)

   - In the Status Bar Indicator Details (Optional) section (new), enter an SQL function in the Details Function field (new).

   ![Status Bar Indicator Details (Optional)](image)

3. Click ![Add a new Record](image). (Add a new Record)

   axiUm adds the new record to the list view.
4. Click (Status Bar Notification Values) 
axiUm displays the Indicator Values window.

5. Enter the fields and options. For our example, we will enter the following records:
   - 1, English
   - 2, Spanish

6. Click (close).
   axiUm closes the Indicator Values window and returns to the Status Bar Notifications window.

7. Click (Level Access).
   axiUm displays the Indicator Access window.
8. Give user levels access to this status bar notification. For our example, we will give the user level Dental Student access by showing this indicator on the status bar.

9. Click (close).
   axiUm closes the Indicator Access window and returns to the Status Bar Notifications window.

Usage:

axiUm displays an indicator on the status.

When you hover over this indicator, axiUm displays a pop-up window displaying the full description.
When you click on this indicator, axiUm displays a window containing a message. The content of the message is a string returned by the SQL function entered in the Status Bar Notification window’s Details Function field, as set up above.

As another example, you can view the number of currently assigned patients with a condition (i.e. missing progress note), and have axiUm display a list of patients that have this condition.

Info Manager

AX-968: Additional fields in the Patient List report
Module: Info Manager ~ Patient List report
Issue: Need additional fields in the Patient List report.
Enhancement: Now the Patient List report contains additional fields.

Go to Report Definition window – Patient Manager Info file - Fields list box. axiUm displays additional items you can select for the Patient List report.

Version 6.00:

Version 6.01:
AX-1605: New calculated fields

Module: Info Manager

Issue: Need additional calculated fields in treatment-related reports.

Enhancement: Added the following new calculated fields in treatment-related reports (e.g. Info Manager window - Billing tab - Treatments category - Edit Report right-click option - Report Definition window - Treatment files):

- Tx. Paid w/ Adj
- Tx. PtPaid w/ Adj
- Tx. InsPaid w/ Adj
- Tx. Pt. Balance
- Tx. Ins. Balance

Maintenance

AX-647: Ability to set family out-of-pocket maximum

Module: Maintenance ~ Edit Coverage Template window, Linked Coverage Template window, Benefit Plan Riders window

Issue: Need the ability for axiUm to charge a limit amount to the family first, and then the remaining amount to insurance. This family out-of-pocket maximum works similarly to the existing patient out-of-pocket maximum.

Enhancement: There is now a Family Maximum checkbox and field in the following windows:

- Edit Coverage Template window
- Linked Coverage Template window
- Benefit Plan Riders window

When the is a drop-down field displays either the Patient Maximum option or the Family Maximum + ded option. Selecting the Family Maximum checkbox enables the field.
**AX-1521: Ability to launch a specific Infinitt application**

**Module:** Maintenance ~ Station Options window

**Issue:** Currently, axiUm supports three Infinitt imaging products (Infinitt Viewer, Aptyx, and Xelix). Need the ability to define each workstations to launch a specific one.

**Enhancement:** Now has the ability to configure each workstation to launch a specific Infinitt software.

**Setup:**

1. Go to Maintenance window - System tab - Stations icon - Station Codes window - (Station Options) - Station Options window - Other section - InterfacedApp section (any one of three) - Execute item.
2. In the Current Value field, enter one of the values listed in the Values list box.

3. Click (Modify Record).
   axiUm saves the changes.

4. Click (close).
   axiUm closes the Station Options window.

Usage:

The next time you launch axiUm and select to open the imaging software, axiUm opens the one set up above.
**AX-1813: Ability to enter apostrophes & dashes in user names**

**Module:** Maintenance ~ Users window  
**Issue:** Need axiUm to have the ability to enter apostrophes in name fields.  
**Enhancement:** Added the ability to enter apostrophes (’ ) and dashes ( - ) in name fields. For example, in the Users window - Personal tab - Name/Address section, the First Name field and the Last Name field can contain names such as YSha’hid and Al-Za’ni.

Note: This does not apply to the User Authentication window (i.e. swipe card usage).

---

**Messenger**

---

**AX-881: Notify patients when messages are sent**

**Module:** Messenger  
**Issue:** Need axiUm to have the ability to send e-mail notifications to patients when you send patient messages.  
**Enhancement:** Now axiUm has the ability to do this.

**Setup:**


![System Options window](image)

2. Go to the System Options section.
3. Select the **Send E-Mail notifications for messages to patient** checkbox (new). Selecting this checkbox enables the E-Mail Template field (new).

4. Go to the E-Mail Template field and click ![ellipsis](ellips). axiUm displays the E-Mail Template window (new).

5. Enter the fields and options.

6. Click the OK button.
axiUm saves the entries, closes the E-Mail Template window, and returns to the System Options window.

Usage:
When you go to the Messenger module and send a message to a patient, axiUm sends an e-mail notification to that patient using the behavior set up above.

---

**Ortho Manager**

**AX-1660: Ability to select default window to display**

**Module:** Ortho Manager ~ Ortho Tx History window

**Issue:** Need the ability to display the Ortho Tx History by default when Ortho Manager is launched. Currently you must open the Ortho Manager module, then select to display Ortho Tx History window.

**Enhancement:** Now has the ability to display the Ortho Tx History by default when Ortho Manager is launched.

**Setup:**

1. Go to Maintenance window - System tab - Stations icon - Station Codes window - (Station Options) - Station Options window - Ortho manager section (new) - Ortho Manager section (new) - DisplayOrthoTxHis item (new).
2. In the Current Value field, enter 1.

3. Click (Modify Record).
   axiUm saves the changes.

4. Click (close).
   axiUm closes the Station Options window.

Usage:

The next time you launch axiUm and open the Ortho Manager module, axiUm immediately displays the Ortho Tx History window.
The Ortho Manager window (i.e. main ortho window) resides in the background, and this window remains open when you close the Ortho Tx History window (existing behavior).

---

**Rolodex**

**AX-2514/2523: Longer fields for patient name entry/display**

*Module*: Rolodex

*Issue*: Need to increase the various patient name fields in axiUm from 15 to 30 characters. This includes fields for both entry and display.

*Enhancement*: Increased name fields to 30 characters. For example, in the Patient Info window - Personal tab - Name section, the name fields are longer to support more characters:

**Version 6.01**

**Version 6.02**

The associated display fields have also increased to allow for longer names to display. For example, the Rolodex window’s patient list loads patient names to display up to 30 characters.

---

**Scheduler**

**AX-680: Viewing appointments of logged-on user only**

*Module*: Scheduler - Active tab

*Issue*: Need the ability for users to see their own appointments only.

*Enhancement*: Now axiUm has the ability for users to see their own appointments only.

**Setup:**

1. Open the User Appointment Book window.
   Go to Maintenance window - Office tab - Users icon - run s search - highlight a record - (Edit Record) - Users window - Additional tab - Scheduling section - Book button.
2. From the list view, highlight a record.

3. From the Access drop-down field, select the Self Only option (new).

4. Click 📧 (Modify Record).

axiUm saves the changes.

You have successfully set up a user to see their own appointments only.

Usage:

When you go to the Scheduler window's Active tab, axiUm displays other provider's appointment time blocks in gray.

**Regular view:**

<table>
<thead>
<tr>
<th>Time</th>
<th>Description</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>08:00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>08:30</td>
<td></td>
<td></td>
</tr>
<tr>
<td>09:00</td>
<td>Doe Jane (F43)</td>
<td>Doe John (U1)</td>
</tr>
<tr>
<td>09:30</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Self-Only view:**

<table>
<thead>
<tr>
<th>Time</th>
<th>Description</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>08:00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>08:30</td>
<td></td>
<td></td>
</tr>
<tr>
<td>09:00</td>
<td>Doe Jane (F43)</td>
<td></td>
</tr>
<tr>
<td>09:30</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note: axiUm also disables the tooltip, the double-click functionality, and all right-click display options.
**AX-1175: Ability to search for chairs stamped as “No Discipline”**

**Module:** Scheduler ~ Appointment Expert window

**Issue:** Need the ability in the Appointment Expert window to:

- Search for chairs with blank/no discipline.
- Define a default discipline.

**Enhancement:** axiUm now has the following new functionalities:

- **Ability to search for chairs stamped as “No Discipline”**.
  If you leave the Discipline drop-down field blank, running a search returns only those appointment blocks associated to no discipline.

- **Ability to default the Discipline drop-down field.**
  In the Station Options window - Scheduler section - ApptExpert branch - Def Discipline item (new), you can set the default discipline. This is useful if you book only a specific discipline at your workstation.

In the Current Value field, enter one of the following values:

- `<Asterisk> - All`
- `<Blank> - No discipline`
AX-1176: Ability to retain previously selected discipline

**Module:** Scheduler ~ Appointment Expert window

**Issue:** If you go to the Discipline drop-down field and select a discipline, and then you go to the Code drop-down field and select an appointment code associated to no discipline, axiUum resets the Discipline drop-down field to the All option. Need axiUum to retain the previously selected discipline.

**Enhancement:** Now in the above scenario, the Discipline drop-down field displays the last selected discipline.

AX-1494: Booking in multiple clinics

**Module:** Scheduler

**Issue:** Appointment cannot be booked if its primary, secondary or additional provider has Clinic Time Exception during appointment time and appointment’s clinic is different from the one specified in the Only Available in field.

**Enhancement:** When trying to book an appointment during provider’s Clinic Time Exception in a clinic different from specified in the Only Available in field, the Provider Clinic Time Exception Warning window is shown. The user can confirm there the booking in the presence of the corresponding exception. Previously, there was an error message shown at this point, which was preventing from completing the booking.

The dialog will be displayed when creating new appointments, editing existing appointments, booking rescheduled appointments, undoing cancelled and failed appointments.

This enhancement is working only for Book scheduling mode and if “Book has reservations”= OFF for the selected book.

**Notes:**
- When modifying Provider Clinic Time Exception (non-recurring), the user will have an option in the “Unschedule Appointment Question” dialog to perform the change w/o unscheduling appointments at corresponding times/clinics, which could have been created using the present workflow.
- An error message will be shown preventing from appointment booking:
  - If Only Available in field = No Clinic (not available)
  - For Chair scheduling mode or Book mode with “Book has reservations”= ON
- Although appointments can be booked in certain clinics/chairs (with confirmation in Provider Clinic Time Exception Warning window), the corresponding time slots will not be shown in Appointment Expert and Wait List (when scheduling in Appointment Fill Mode).

AX-1604: Appointment Expert window indicates overflow chairs

**Module:** Scheduler ~ Appointment Expert window

**Issue:** Need the Appointment Expert window to include available overflow chairs in the search results.

**Enhancement:** Now axiUum has the ability to include available overflow chairs in the Appointment Expert window’s search results.
Setup:

1. Open the Appointment Expert Options window.
   
   Go to Scheduler window - (Expert) - Appointment Expert window - Options button.

2. Go to the Search section.

   ![Image](image.png)

   There is an Include Overflow Chairs (used by 'Search on Available Chairs') checkbox (new). This option works in Chair mode and Book mode when you select the Search on Available Chairs option.

3. Select the Include Overflow Chairs (used by 'Search on Available Chairs') checkbox (new).

   You can default this checkbox to be selected by going to the Station Options window - Scheduler section - ApptExpert section, there is an InclOverFlowChairs item (new):
   - 0 - Off
   - 1 - On

4. Click the Accept button.
   axiUm saves the changes.

Usage:

- When you go to the Appointment Expert window and run a search, axiUm includes openings for overflow chairs. Overflow chairs are those in the Maintenance window - Scheduler tab - Chairs icon - Chairs window with the Overflow Chair checkbox selected.

- If the Appointment Expert window has the Search on Reserved Chairs option selected, running a search includes reserved overflow chairs.

- If the Appointment Expert window has the Search on Available Chairs option selected, the options in the Chair drop-down field excludes overflow chairs.
**Transactions**

**AX-1130: Riders & site-specific coverages for NY Medicaid**

**Module:** Transactions

**Issue:** When determining whether a treatment is covered by NY Medicaid insurance, axiUm was ignoring rider coverages and site-specific coverages. Currently, axiUm covers treatments for all sites, regardless of the selection made in the Select Tooth Sites window.

**Enhancement:** Now you can add and remove rider coverages for a range of procedures and ages. axiUm considers site-specific coverages for main (i.e. default) and rider coverage templates.

**AX-1474: Display indicator if EOB files exist in treatment records**

**Module:** Transactions - General tab

**Issue:** Need axiUm to indicate the existence of an EOB file on the treatment record of the General tab's Transaction History sub-tab, similarly to how it's displayed in the Ins Pmt tab.

**Enhancement:** Now the Transaction History sub-tab's list view displays an icon next to the record containing an EOB file.

To view the attachment:

1. Highlighting the record.

2. Right-click to display a list of options.
3. Select the View Attachment right-click option (new).

axiUm does one of the following:

- If the selected record contains only one attachment, axiUm displays the attachment.

- If the selected record contains more than one attachment, axiUm displays the Select Attachment (Ins Pmt) window:

![Select Attachment (Ins Pmt) window]

This window, including the above feature and behavior already exists in the Transactions window’s Ins Pmt tab. This enhancement was to extend this feature into the Transactions window’s General tab.

---

**X-Ray**

**AX-1517: Ability to send X-ray procedures to Xelis**

**Module:** X-Ray

**Issue:** Need axiUm to have the ability to send x-ray procedures directly to Xelis from the EHR window’s Tx History tab.
**Enhancement:** axiUm now has the ability to send planned (and approved) X-ray procedures directly to Xelis from the EHR window’s Tx History tab.

---

**AX-2098: Integration with VixWin**  
**Module:** X-Ray  
**Issue:** Need axiUm to support the VixWin imaging interface (support for old product has been deprecated). Also need to support patient IDs up to 64 characters.  
**Enhancement:** Added a new station option for the new text-based VixWin Imaging integration (i.e. vixwin.exe -I), and integrated VixWin with the non-DDE interface.

**Setup:**

1. Go to Maintenance window - System tab - Stations icon - Station Codes window - (Station Options) - Station Options window - Other section - InterfacedApp1 section - Execute item.

2. In the Current Value field, enter c:\vixwin\vixwin.exe -I.

3. Click 📂 (Modify Record).
axiUm saves the changes.

4. Click \(\times\) (close).
   axiUm closes the Station Options window.

Usage:
When you go to your main axiUm window and select the imaging icon, axiUm integrates the VixWin application with the non-DDE interface, for the currently selected patient.
General

AX-2525: Longer fields for patient name entry/display
Module: UI
Issue: Need to increase the various patient name fields displayed throughout axiUm from 15 to 30 characters. This includes both entry and display fields.
Enhancement: Now patient name fields can contain up to 30 characters. This enhancement is an extension of AX-2514/2523 implemented in 6.02.00, and ensures that it is applied to all other areas of axiUm where this is possible, including tooltips.

Scheduler

AX-2832: Ability to suppress Shared Reserve Warning window
Module: Scheduler
Issue: Need to add the ability to suppress the display of the Shared Reserve Warning window.
Enhancement: Now axiUm has the ability to suppress the display of the Shared Reserve Warning window.

Setup:

1. Open the Station Options window.
   Go to the Maintenance window - System tab - Stations icon - Station Codes window - (Station Options).
2. Go to Scheduler section - Schedule section - ShowSharedChrWarn item (new).
   - 0 - No: This retains the exiting behavior and displays the Shared Reserve Warning window.
   - 1 - Yes: This suppresses the display of the Shared Reserve Warning window.

3. In the Current Value field, enter 1.

4. Click 📄 (Modify Record).
   axiUm saves your changes.

5. Click ✗ (close).
axiUm saves the entries, closes the Station Options window, and returns to the Station Codes window.

6. Click (close).
   axiUm closes the Station Codes window and returns to the Maintenance window.

Usage:
The next time you schedule an appointment for providers who share chairs, axiUm suppresses the display of the Shared Reserve Warning window.

Transactions

AX-2180: Bill the amount of patient charge for dual WDE insurance
Module: Transactions - Treatment tab
Issue: When you add treatments for elective procedures with a patient charge for a patient with dual WDE coverage, the patient’s charge is not billed to the patient. Need axiUm to bill this to the patient.
Enhancement: Amended the Willamette package to charge the patient the lowest amount of patient's charges when procedure codes are one of D2392, D2393, or D2394, and dual Willamette coverage.
axiUm Release 6.02.02
Released: February 23, 2015

EHR

AX-2845: Ability to send in-process X-ray procedures to Xelis
Module: EHR - Tx History tab
Issue: Need the ability to send in-process X-ray procedures from axiUm to Xelis (imaging software) for capturing X-ray images.
Enhancement: Now has the ability to send in-process procedures from axiUm to Xelis. You can select multiple X-ray procedures (planned and in-process) from the EHR window’s Tx History tab, and send them to Xelis.

AX-3195: Approve in-process treatments in Xelis
Module: EHR - Imaging tab
Issue: Need the ability to enter approve in-process treatment records in Xelis (imaging software) using axiUm's user profiles and settings. This lets you approve work based on axiUm's configuration and control the number of additional images taken.
Enhancement: Now axiUm has the ability to do this.

General

AX-2981: Increased size of the Set axiUm Default window
Module: Others
Issue: In the Set axiUm Defaults window (in Tools menu - Set axiUm Defaults option), the Practice drop-down field and the Clinic drop-down field are not long enough to show longer names.
Enhancement: Increased the size of the Set axiUm Defaults window, thereby allowing longer drop-down fields for displaying longer names.

Version 6.01
Version 6.02.02

Note: Both drop-down fields now display options in alphabetical order.
General

**AX-2959: Crystal Reports now allows the display of long names**
**Module:** Crystal Reports  
**Issue:** Need Crystal Reports to have the ability to display longer patient names.  
**Enhancement:** Over 90 Crystal Reports have been adjusted to allow the display of long names. Also, Sharjah's reports have been customized so that they no longer display "$" in the currency fields.

**AX-3094: Update copyright dates in axiUm to 2015**
**Module:** Others  
**Issue:** Need to update the copyright date to 2015.  
**Enhancement:** The About axiUm window has been updated to reflect current year.