Contents

axiUm Release 5.20.00

Dispensary

121487 - Time Out column is visible by default

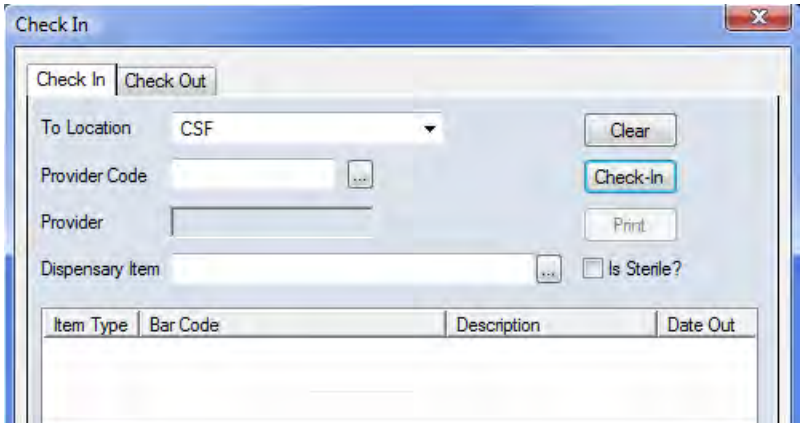
Module: Dispensary ~ Check In window, Check Out window

Issue: In the Check In window and the Check Out window, the Time Out column is outside the viewing range. If you want to see this column, you must use the scroll bar.

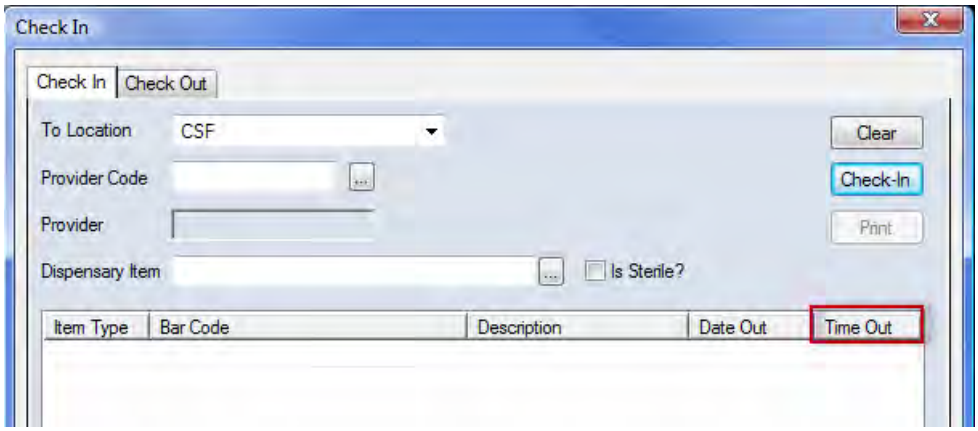
Enhancement: Now when you open the Check In window or the Check Out window, the Time Out column is visible by default.

Check In window

Current:

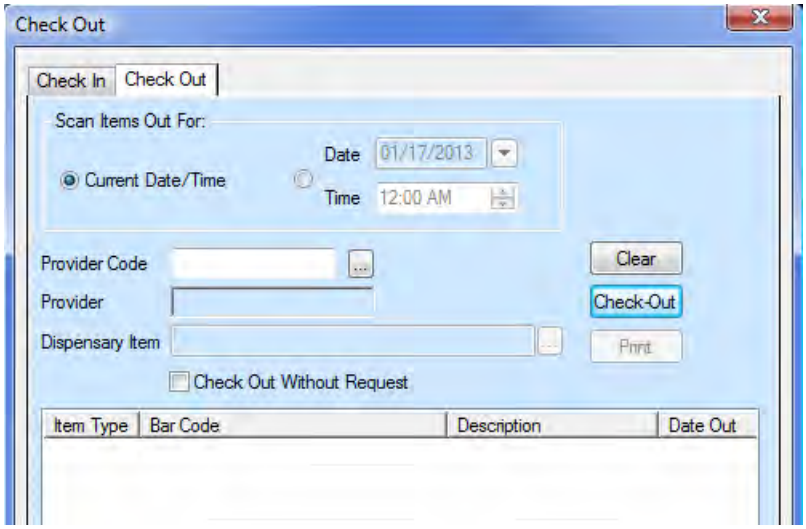


New:

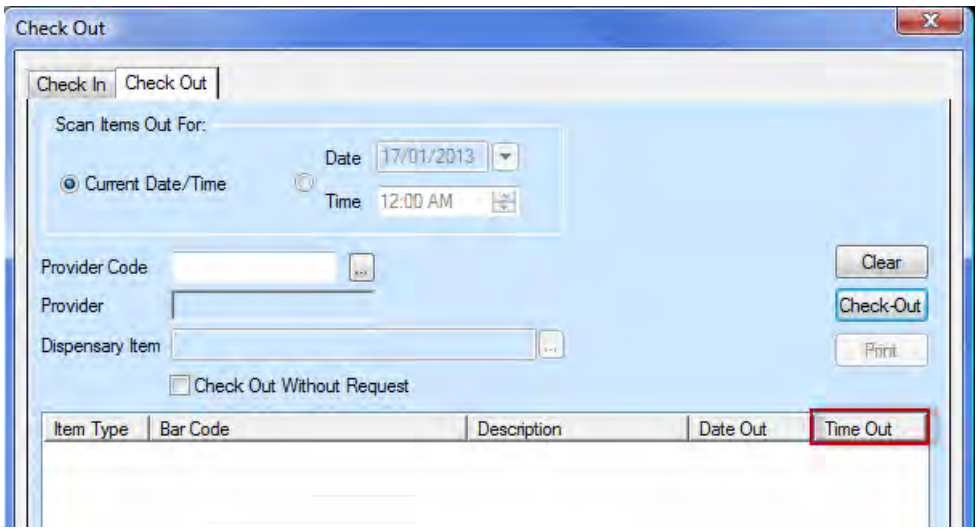


Check Out window

Current:



New:



EDI Claims

128865 – Ability to search by CPT codes

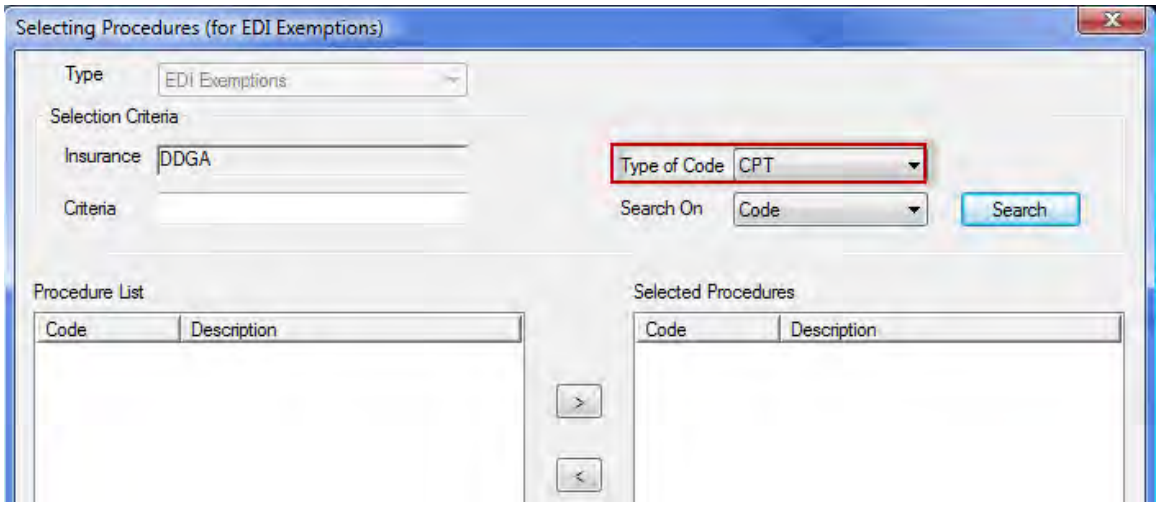
Module: EDI Claims ~ Selecting Procedures (for EDI Exemptions) window

Issue: A number of insurance setup windows are limited to ADA codes. Need the ability to search by CPT codes.

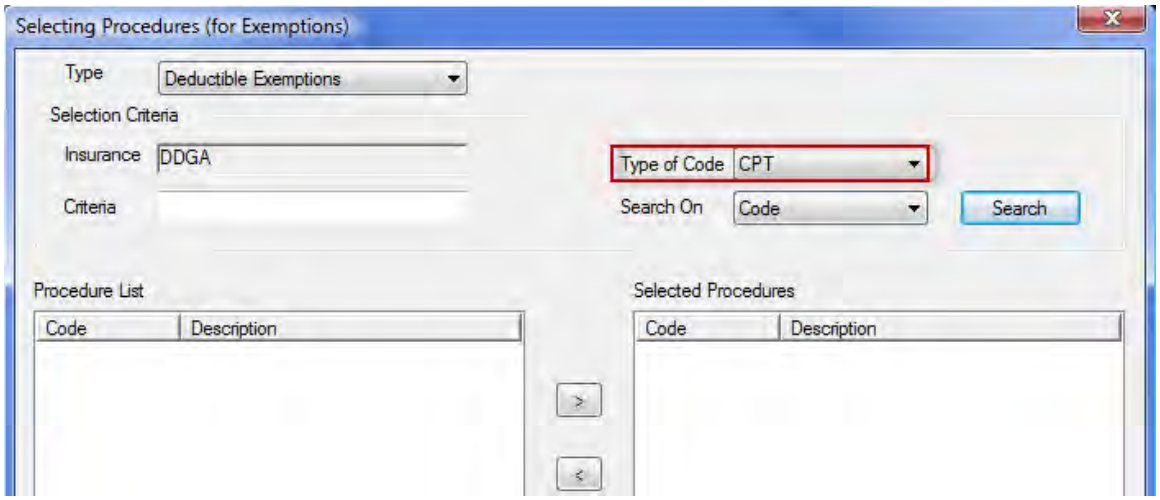
Enhancement: You can now select to search by CPT codes. The following windows now display a Type of Code drop-down field (new), and you can select the ADA option or the CPT option:

- Selecting Procedures (for EDI Exception) window (changed):

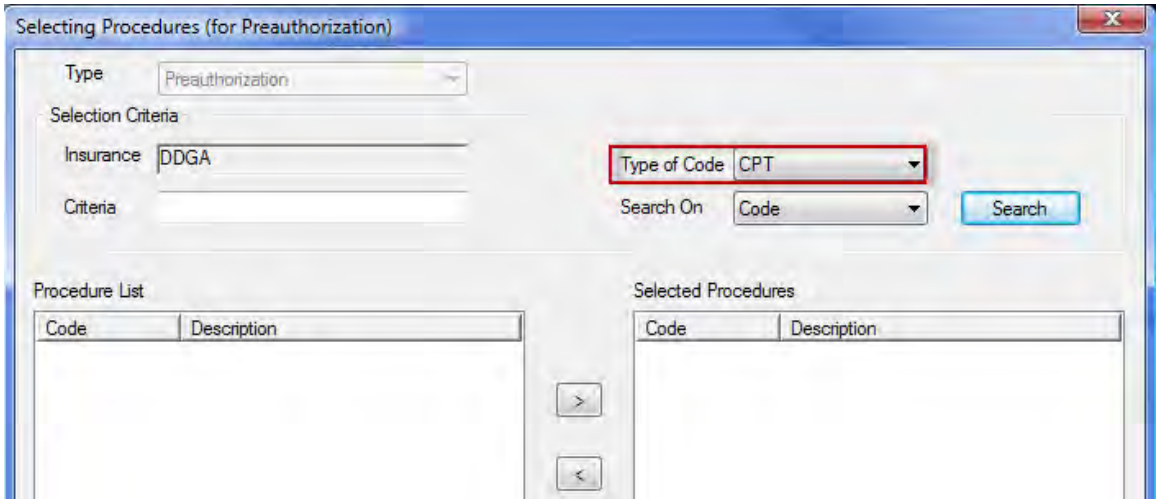
Go to Maintenance window - Insurance tab - Insurance Companies icon - Insurance Companies List window - run a search - highlight a record - (Edit Record) - Insurance Company window - EDI Exempt button.



- Selecting Procedures (for EDI Exception) window (changed):
  Go to Maintenance window - Insurance tab - Insurance Companies icon - Insurance Companies List window - run a search - highlight a record - (Edit Record) - Insurance Company window - Exemptions button.



- Selecting Procedures (for Preauthorization) window (changed):
  Go to Maintenance window - Insurance tab - Insurance Companies icon - Insurance Companies List window - run a search - highlight a record - (Edit Record) - Insurance Company window - Pre-Auth button.



131019 – Missing state license number causes EDI rejection

Module: EDI Claims

Issue: In 5010 EDI claims, the Billing Doctor No Qualifier is always G2, regardless of the setting in Maintenance window - Insurance tab - Insurance Companies - (Edit Record) – Insurance Company - Billing Numbers button - Billing Number window - Billing No field.

Also, if the billing doctor's phone number is blank, the claim is rejected.

Enhancement: If Billing Doctor No. Qualifier is 0B, 1G, G2 or LU, axiUm will use that value. If a different value exists, axiUm defaults them to G2.

Also, if the billing doctor's phone number is blank, axiUm uses the practice phone number.

EHR

50785 – Improved ability to filter treatment records by selected tooth#

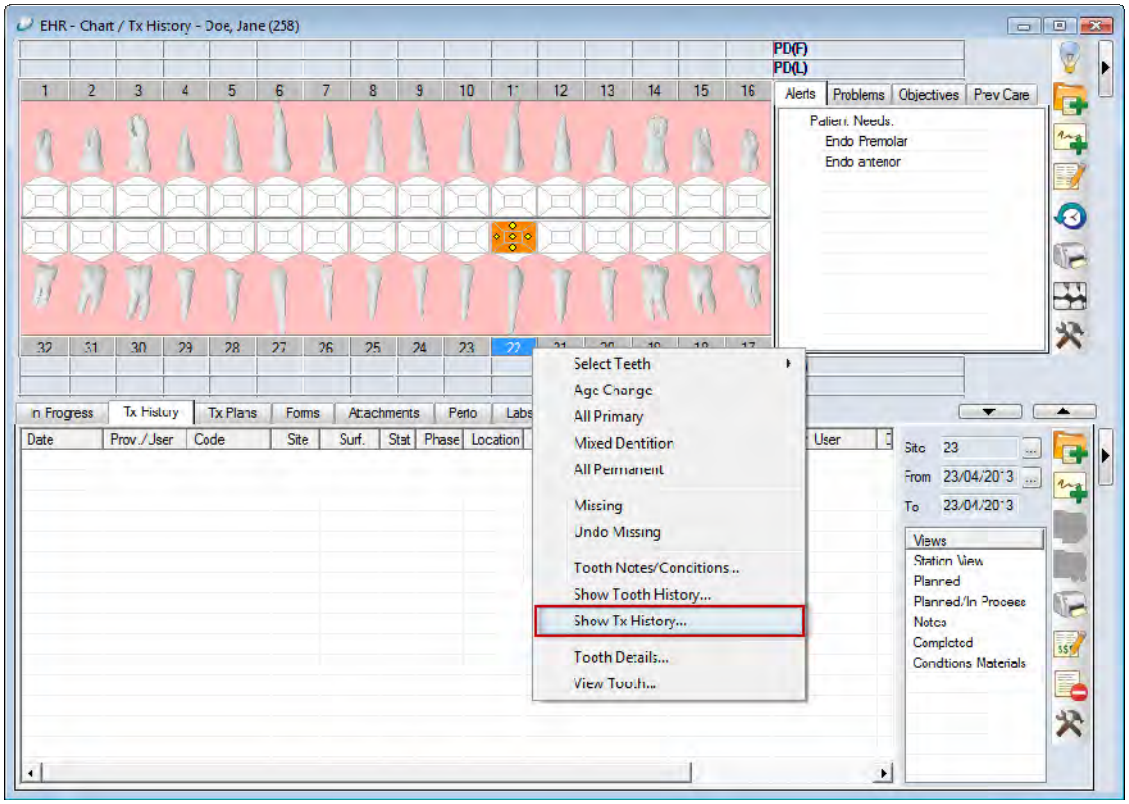
Module: EHR – Tx History tab

Issue: If you want to filter records in the list view by tooth selection, you must go to the Site field, click (ellipsis) to display the Select Sites window, click the Deselect All button, select a specific tooth number checkbox, and click the OK button to close the Select Sites window. Need a quicker way to do this.

Enhancement: You can now filter records by selecting a tooth or multiple teeth on the odontogram and selecting the Show Tx History right-click option.

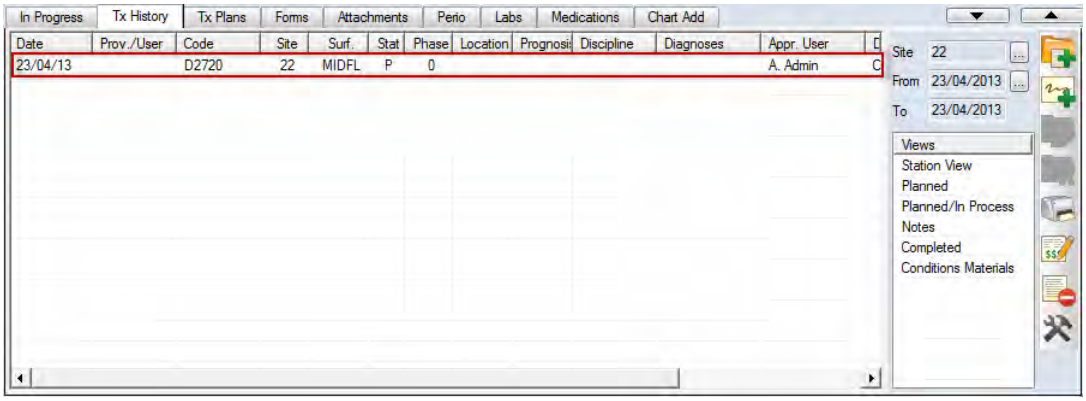
Usage:

1. Go to the EHR window's Tx History tab.
2. From the odontogram, select a tooth. For our example, we will select tooth #24.You can also select multiple teeth.
3. Right-click to display a list of options.



4. Select the Show Tx History option (new).

   axiUm filters the list view to display only those records (e.g. treatments, conditions, notes, etc.) for the selected tooth (i.e. tooth #24).



   You have successfully filtered records in the Tx History tab's list view by selecting a tooth on the odontogram.

To return to the original list view, go to the odontogram, deselect the tooth, and select the Tx History right-click option again.

Note: You can use the same method to filter records in the Labs tab.

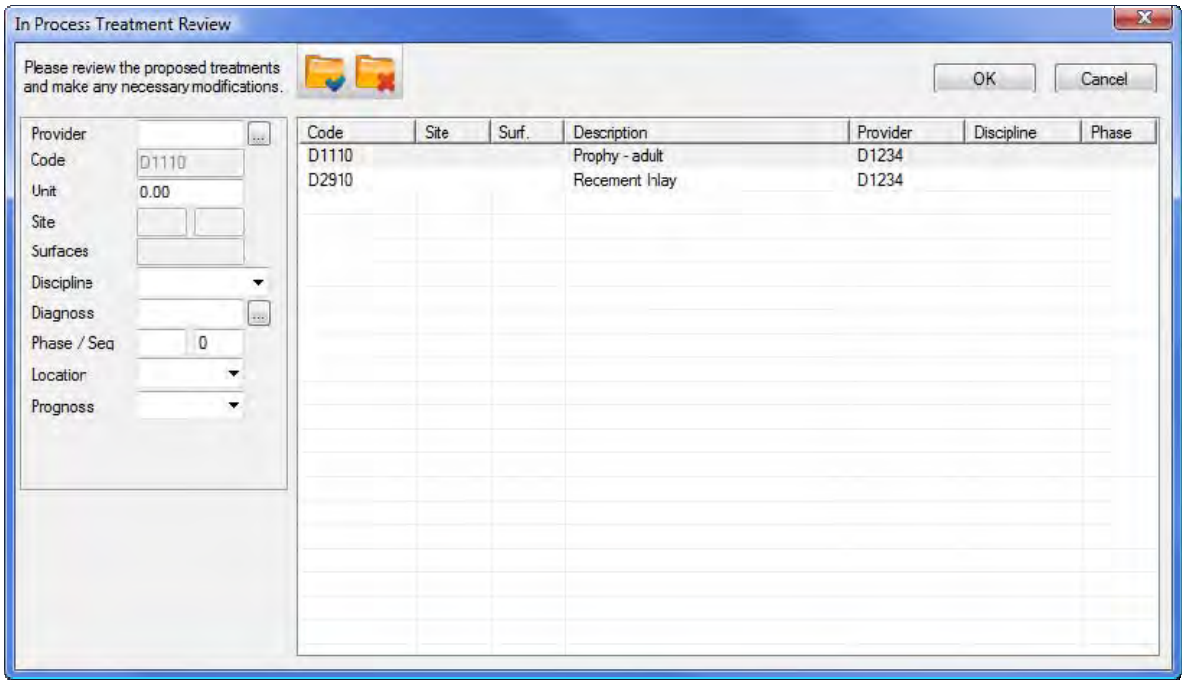
61734 – Improved the Complete Treatments window & workflow

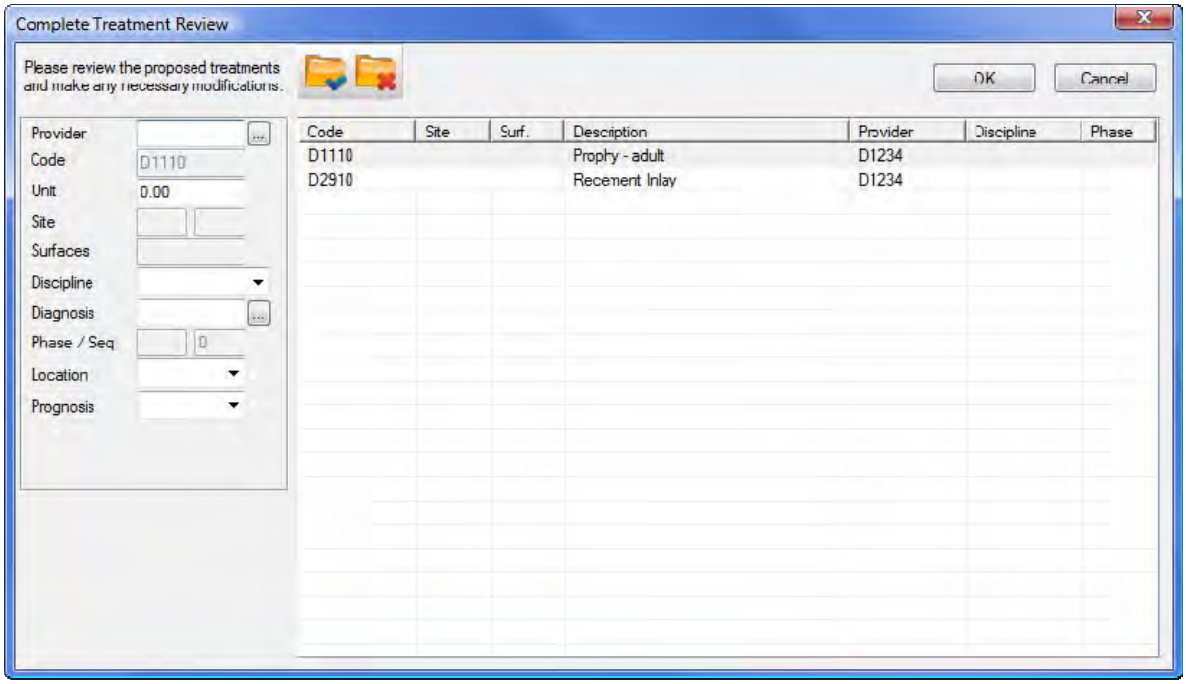
Module: EHR ~ Complete Treatment Review window

Issue: When you go to the EHR module's Tx History tab, highlight *multiple* treatment records (planned or in-process), and change to in-process status or completed status, axiUm displays the Change to In Process Treatments window or the Complete Treatments window. Then after you complete the fields and click the OK button, axiUm displays the In Process Treatment Review window or the Complete Treatment Review window displaying fields repetitive of the previous window. This causes workflow issues and confusion.

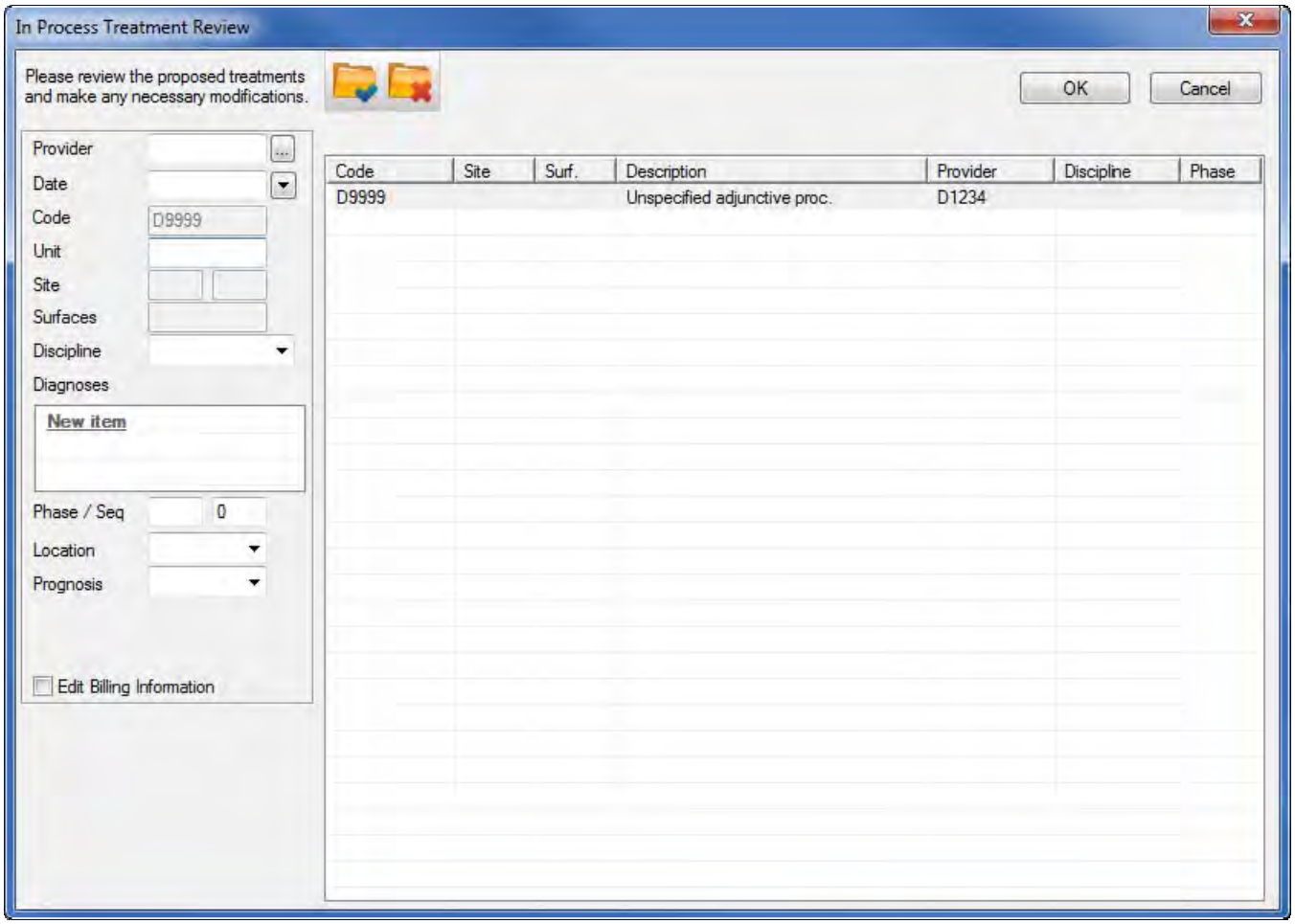
Enhancement: When you change the status of *one or more* treatment records by selecting the In Process Tx Visit right-click option or the Complete Treatments right-click option, axiUm skips the Change to In Process Treatments window (deprecated) or the Complete Treatments window (deprecated) and displays the In Process Treatment Review window (changed) or the Complete Treatment Review window (changed).

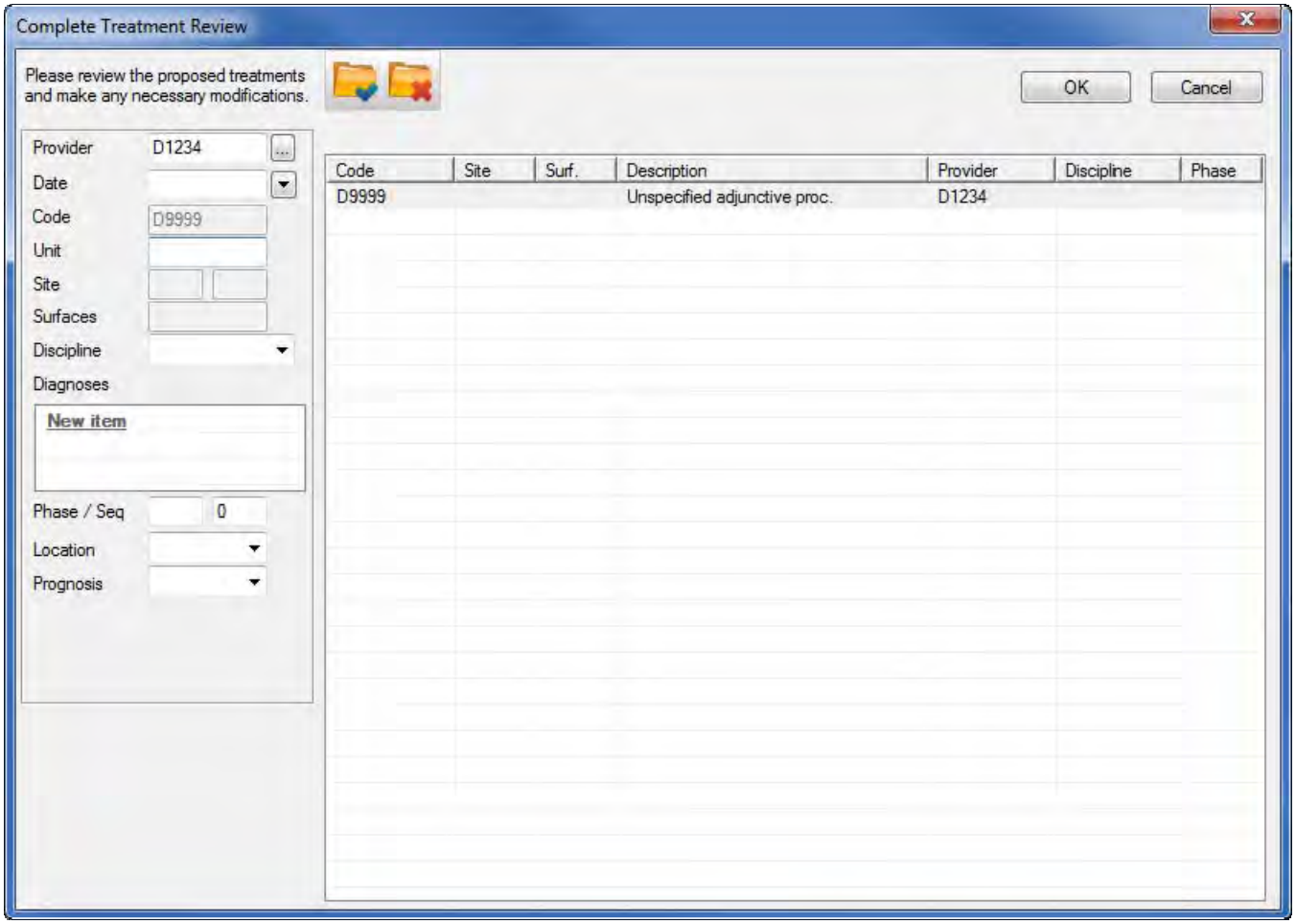
Current:




Complete Treatment Review
Please review the proposed treatments and make any necessary modifications.
OK
Cancel
Provider
Code
D1110
Unit
0.00
Site
Surfaces
Discipline
Diagnosis
Phase / Seq
0
Location
Prognosis
Code
Site
Surf.
Description
Provider
Discipline
Phase
D1110
Prophy - adult
D1234
D2910
Recement Inlay
D1234

New in 5.20:


In Process Treatment Review
Please review the proposed treatments and make any necessary modifications.
OK
Cancel
Provider
Date
Code
D9999
Unit
Site
Surfaces
Discipline
Diagnoses
New item
Phase / Seq
0
Location
Prognosis
Edit Billing Information
Code
Site
Surf.
Description
Provider
Discipline
Phase
D9999
Unspecified adjunctive proc.
D1234



69031 – Ability to select default dosage & set up display order

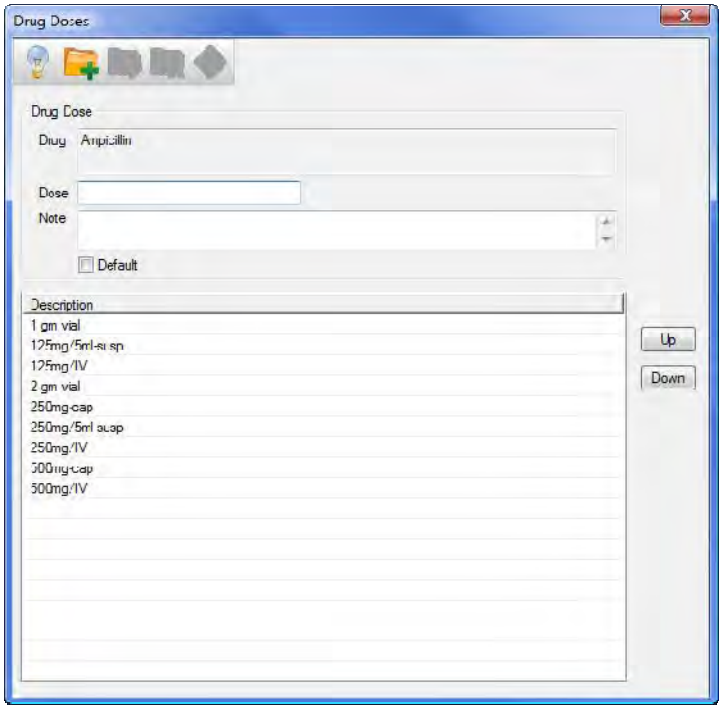
Module: EHR

Issue: Need the ability to select a default drug dosage so the most common one (for the associated drug) is automatically shown. Also need the ability to customize the display order of the drug dosages so the more common ones appear at the top of the list.

Enhancement: Now you can select a default drug dosage, and also set up the display order of the drug dosages. This lets you select drug dosages faster when entering medications and prescriptions.

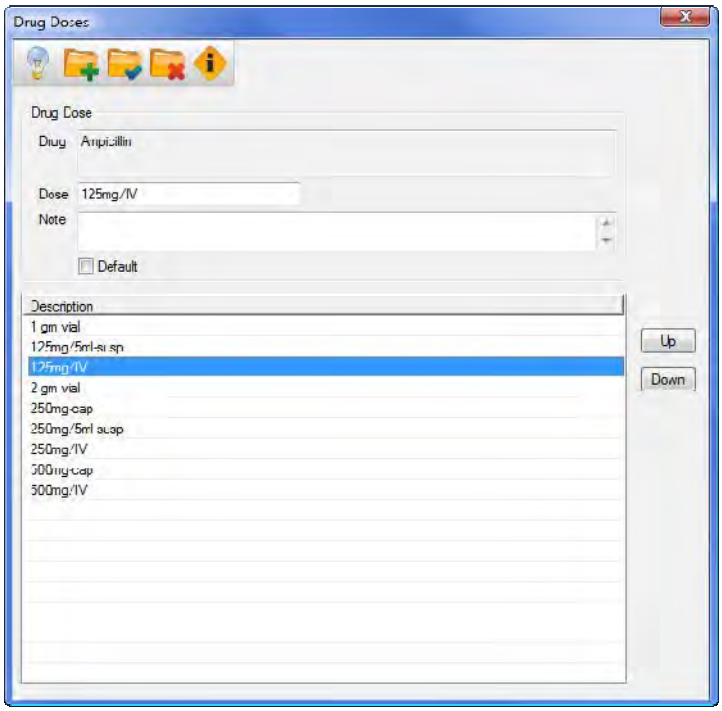
Setup:

1. Open the Drug Doses window. For our example, we will use the drug Ampicillin.
   Go to Maintenance window – EHR tab – Drug Definitions icon - Drug Definition List window - (Drug Doses).

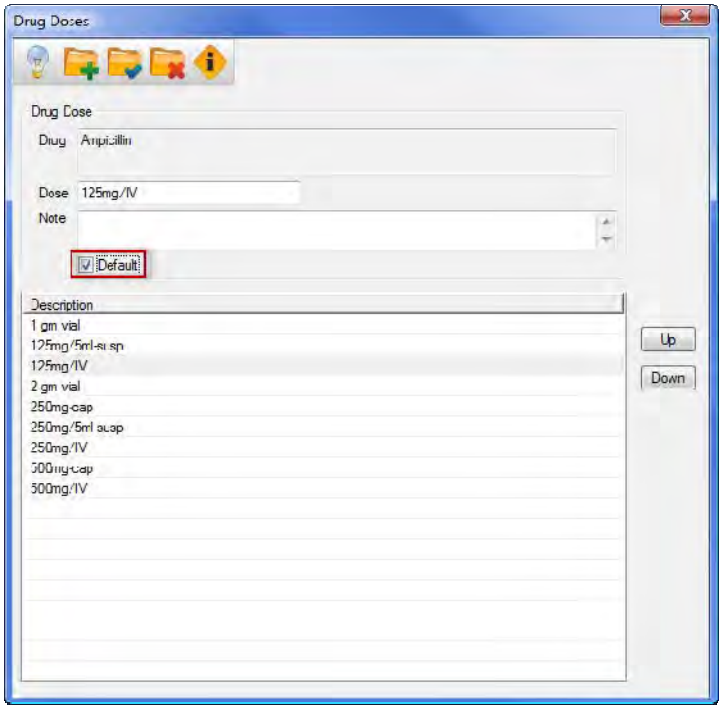


We will select a default dosage. For our example, we will select 125mg/IV.

2. From the list view, highlight the record 125mg/IV.



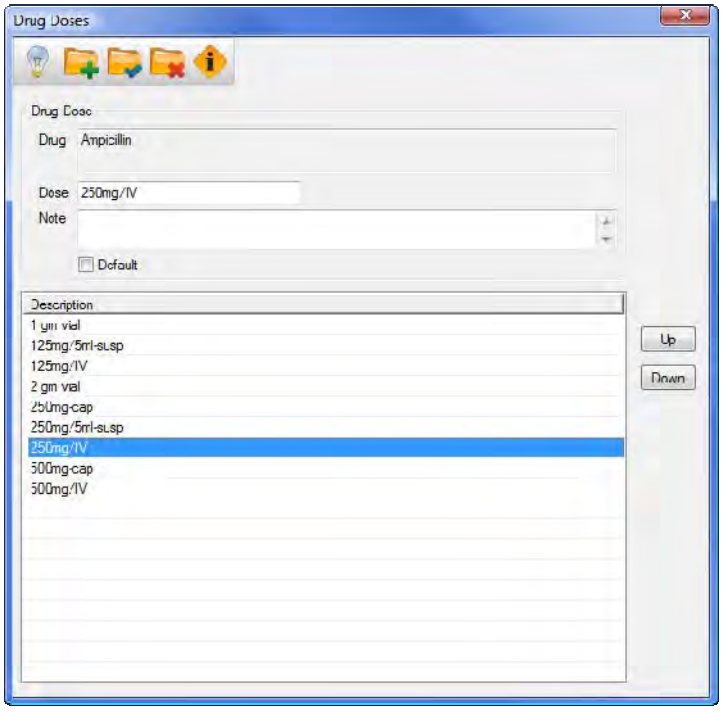
3. Select the Default checkbox (new).



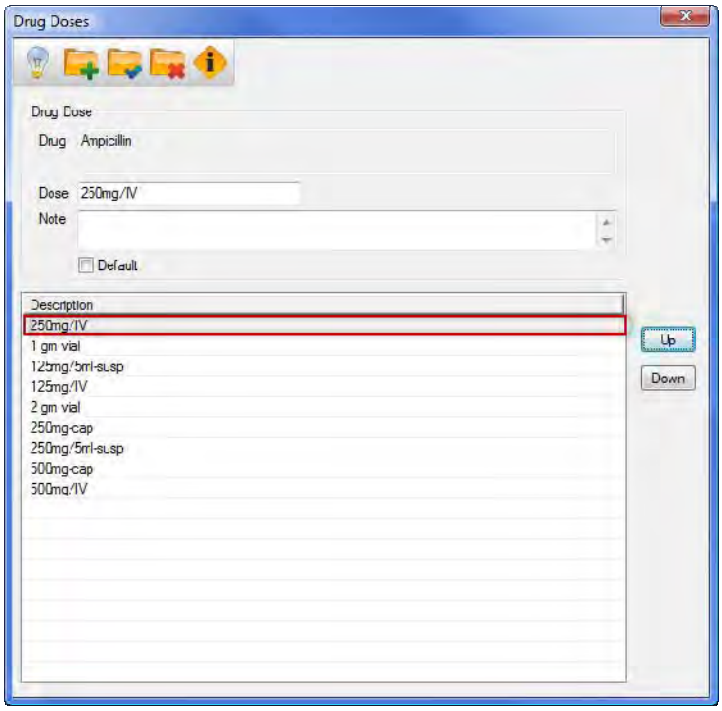
4. Click (Modify Record).
   axiUm saves your changes.

   Next we will manually sort the display order of the dosages. For our example, we will sort 250mg/IV to the top of the list.

5. From the list view, select 250mg/IV.



6. Click the Up button until the item 250mg/IV is at the top of the list view.
   Note: Both the Up and Down buttons are new.

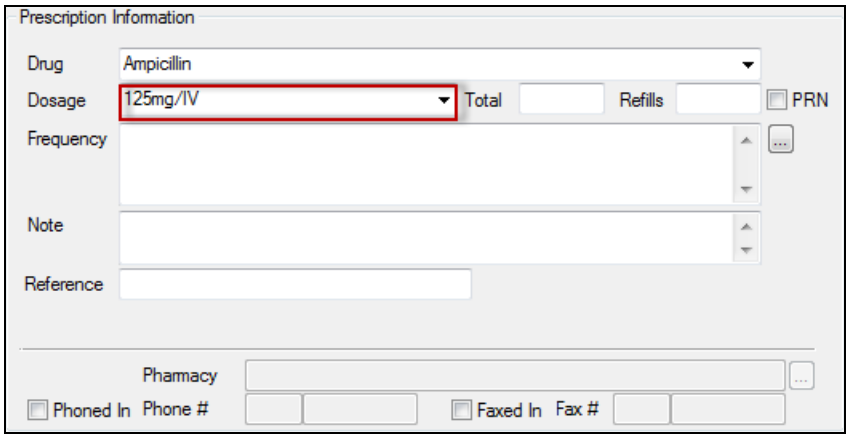


7. Click (close).
   axiUm automatically saves the order of the dosage, closes the Drug Doses window, and returns to the Drug Definition List window.

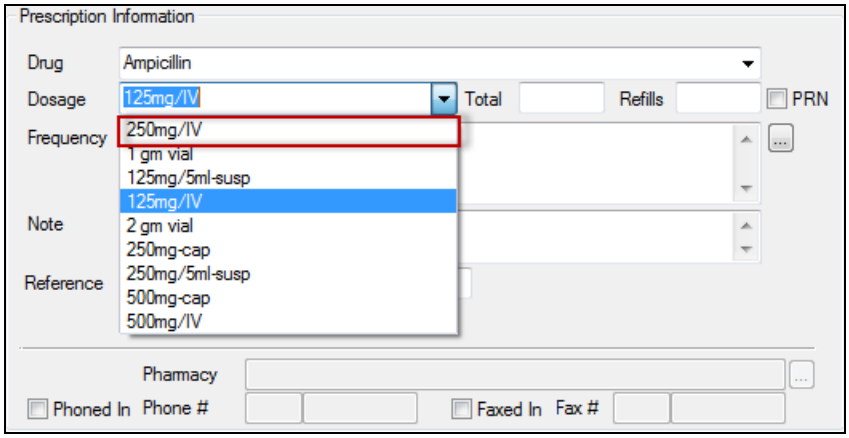
8. Click (close).
   axiUm closes the Drug Definition List window and returns to the Maintenance window.

Usage:

When you enter a drug, such as in the Patient Prescription Entry window's Drug drop-down field, and you select the drug Ampicillin, axiUm defaults the Dosage drop-down field to 125mg/IV.



If you click the Dosage drop-down field, the options display in the order you set it up (i.e. the 125mg/IV option is shown at the top).



96625 – Improved the workflow of adding scanned consent forms

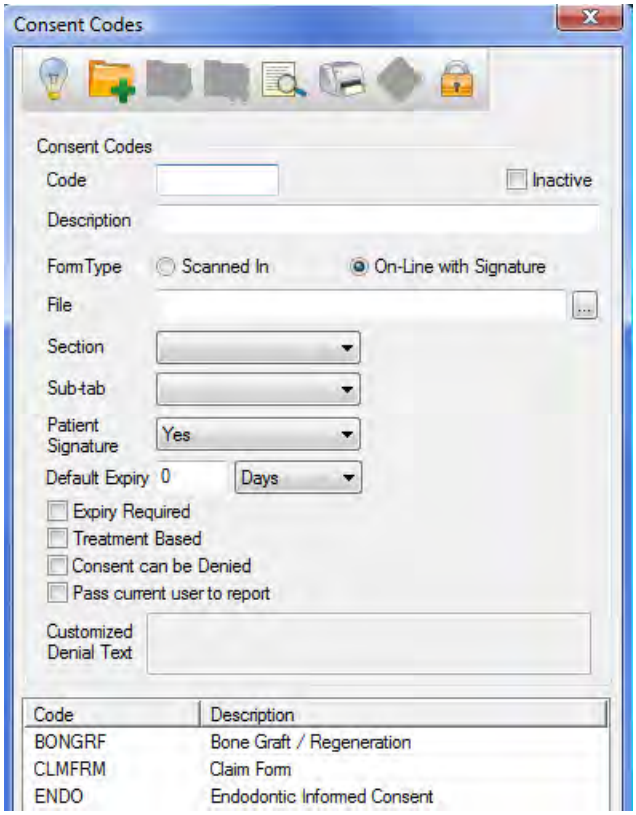
Module: EHR

Issue: Online consent forms that are signed electronically can be added to a treatment record. However, hardcopy consent forms that are signed and then scanned into axiUm cannot be added to a treatment record. Need the ability to do this.

Enhancement: Improved the workflow of adding scanned consent forms so you can associate it to treatment records.

Setting up consent forms:

1. Open the Consent Codes window (changed).
   Go to Maintenance window – EHR tab – Consent Codes icon.



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

3. Enter the fields and options. For our example, we will enter the following:
   - Code: In this field, enter SCAN.
   - Description: In this field, enter Scanned-in consent form.
   - Form Type: From this section, select the Scanned In option.
   - Section: From this drop-down field, select the Consent Forms option.
   - Sub-tab: From this drop-down field, select the Consents option.
   - Treatment Based: Select this checkbox. Note that this checkbox now remains enabled at all times.

Consent Codes

Code: SCAN — Inactive

Description: Scanned-in consent form

Form Type: Scanned In — On-Line with Signature

File:

Section: Consent Forms

Sub-tab: Consents

Patient Signature: No

Default Expiry: 0 Days

Expiry Required

Treatment Based

Consent can be Denied

Pass current user to report

Customized Denial Text:

4. Click (Add a new Record).
   axiUm saves the entries and displays the new record in the list view.

Code	Description
BONGRF	Bone Graft / Regeneration
CLMFRM	Claim Form
ENDO	Endodontic Informed Consent
GINGRF	Gingival Graft Surgery
IMPINF	Implant Info and Consent
NITRO	Nitrous Consent
ORAFAC	Orafacial Pain and Oral Med
ORTHO	Ortho Consent
PERFLA	Perio Flap Surgery
PRCNST	Program Acceptance Consent
REFER	Referral
RQ_IMP	Dental Treatment with Implants
SCAN	Scanned-in consent form
SP2	CONSENTIMIENTO PARA CIRUGÍA OR
SP3	Consentmiento - Sedacion

5. Click (Level Access) (new).
   axiUm displays the Consent Code Access window (new).

Consent Code Access

Consent Code Access

Code: SCAN

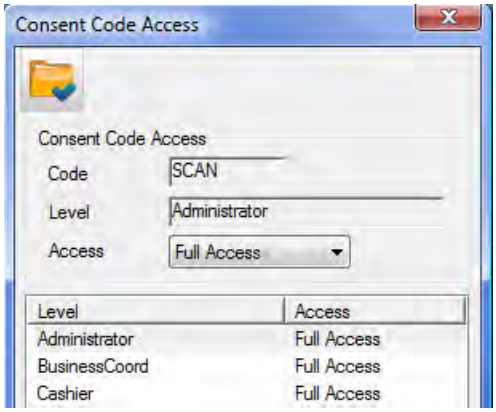
Level: Administrator

Access: Read Only

Level	Access
Administrator	Read Only
BusinessCoord	Read Only
Cashier	Read Only

Use this window to grant user level access to consent forms.

6. Grant full access for a user level. For our example, we will give all user levels full access to this consent form.



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

8. Click (close).
   axiUm closes the Consent Code Access window and returns to the Consent Codes window.

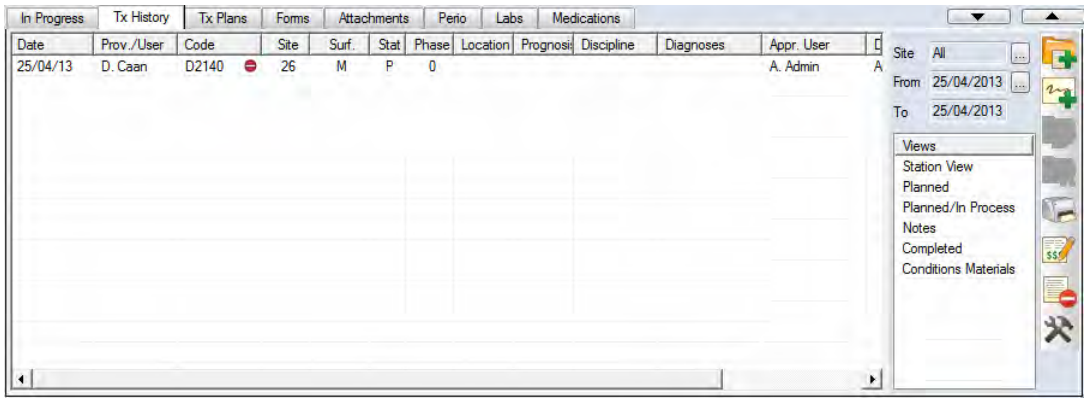
9. Click (close).
   axiUm closes the Consent Codes window and returns to the Maintenance window.

Entering a planned treatment and attaching a scanned-in consent form:

Make sure you are logged on as a user who requires patient consents (i.e. in the Users window – Provider tab – Controls section, the Requires Pt Consent checkbox is selected).

1. Go to the Rolodex and select a patient who requires treatment consent (i.e. in the Patient Info window – Codes tab, the Requires Treatment Consent checkbox is selected).

2. Go to the EHR module and enter a planned treatment for a procedure that requires a consent form.

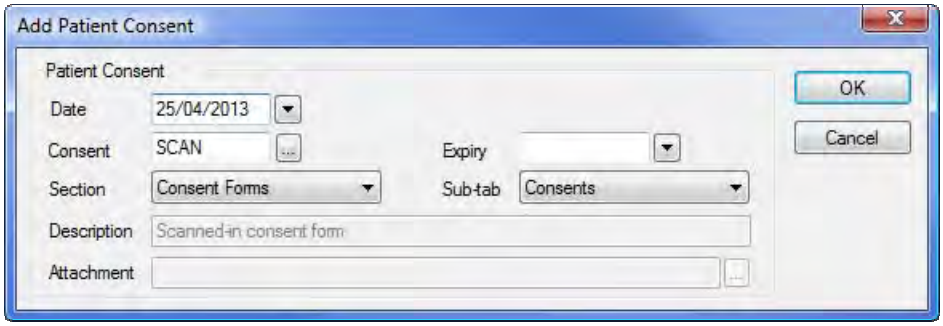


Notice the (consent icon) on the treatment record.

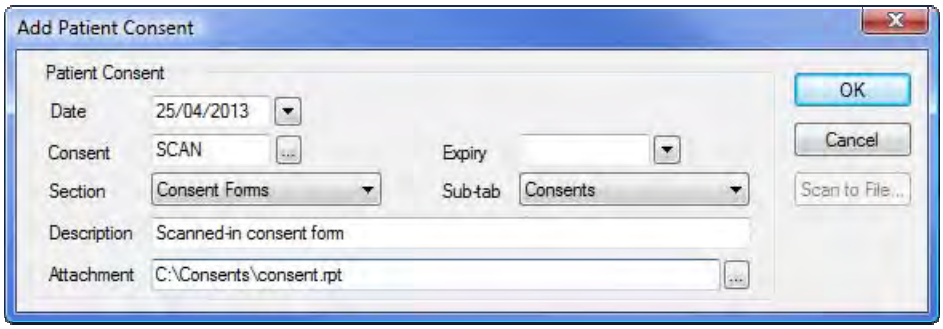
Note: If you require faculty approval, you must receive approval before axiUm displays (consent icon).

3. Click (Add Patient Consent).
   axiUm displays a list of options.

4. Select the Add Patient Consent option.
   axiUm displays the Add Patient Consent window.

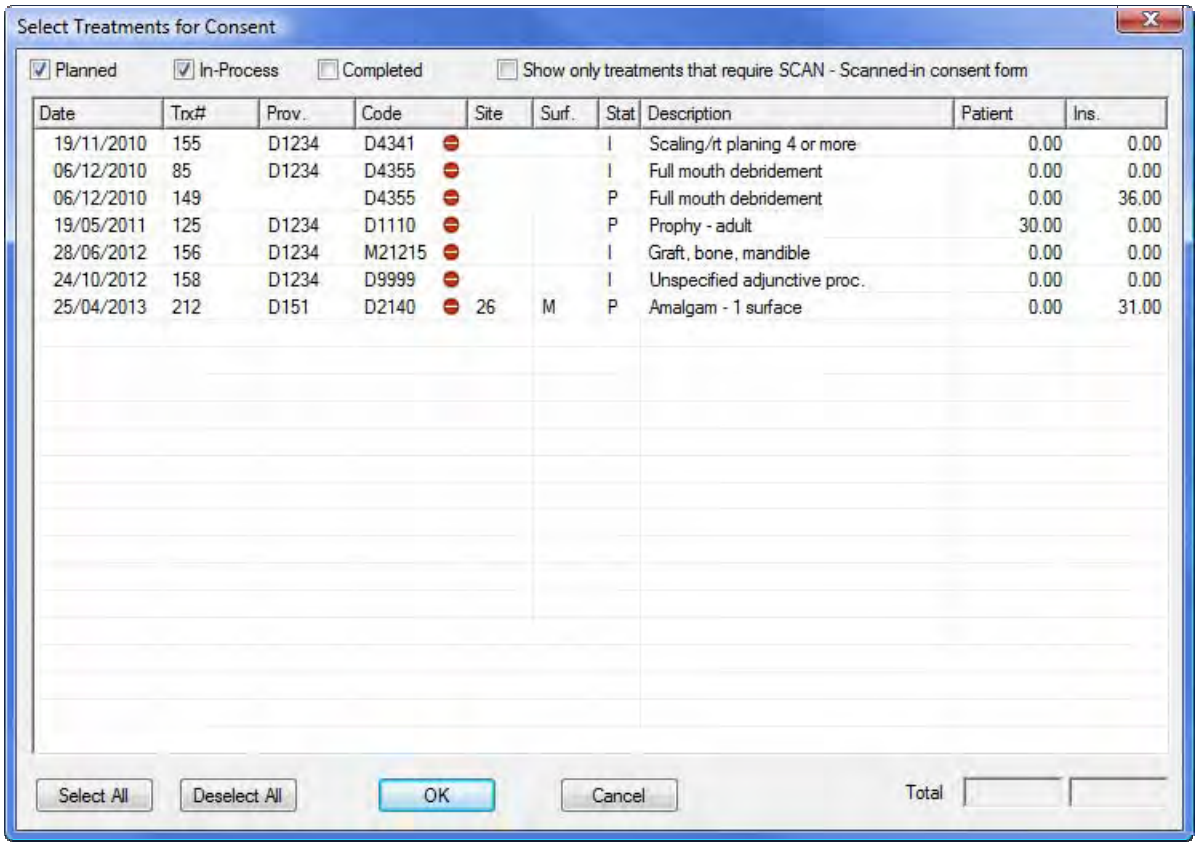


5. Enter the fields and options. For our example, we will enter the following:
   - Consent: From this drop-down field, select the Scan option.
   - Section: From this drop-down field, select the Consent Forms option.
   - Sub-tab: From this drop-down field, select the Consents option.
   - Attachment: Click (ellipsis) to display the Select the Attachment File and select the scanned-in attachment.



6. Click the OK button.

   axiUm saves the entries, closes the Add Patient Consent window, and displays the Select Treatments for Consent window (new).

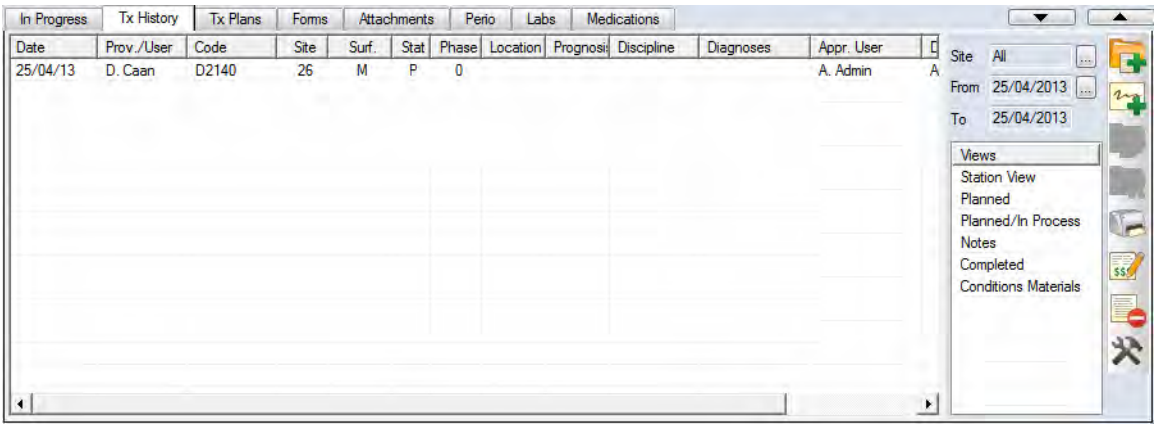


   Use this window to select treatments associated to this consent form. axiUm displays this window only if the consent form you selected is a treatment-based consent.

7. Select a corresponding treatment. You can highlight multiple records to add this consent form to multiple treatments.

8. Click the OK button.

   axiUm attaches the consent form to the selected treatment records, closes the Select Treatments for Consents window, and returns to the EHR window.



axiUm has removed the (consent icon) from the treatment record.

99400 – axiUm now retains hard carriage returns in text box

Module: EHR ~ Lab Order Details window

Issue: When you go to the Lab Order Details window and enter or modify the Details text box to include hard returns, saving the record removes these hard returns.

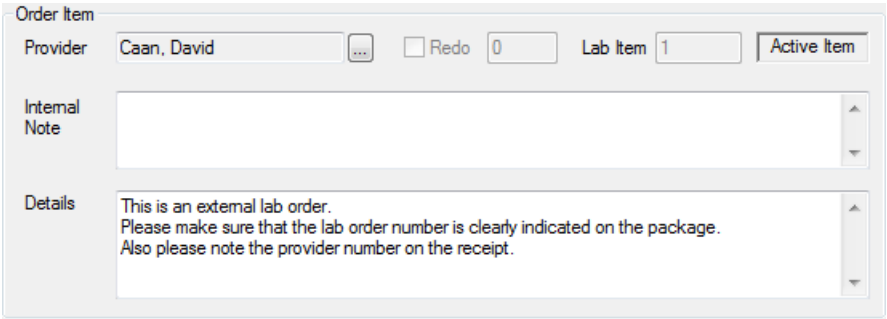
Steps to replicate:

1. Open the Lab Order Details window.

   Go to EHR window – Labs tab - (Create a new Record) – Add Lab Order window – enter details – OK button.

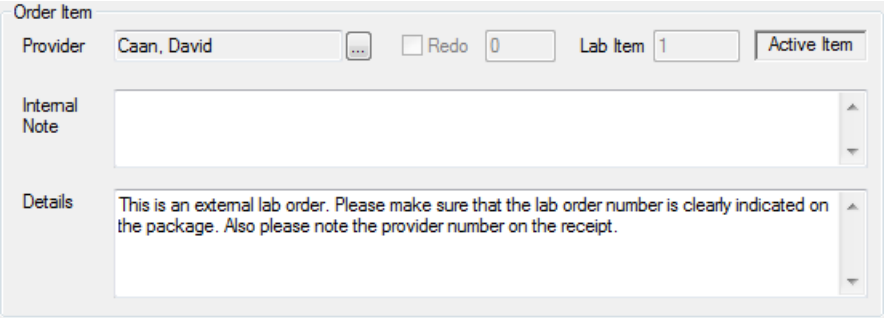
2. In the Details text box, enter text and press RETURN after each sentence.

   axiUm displays a new line after each sentence, and this is fine.



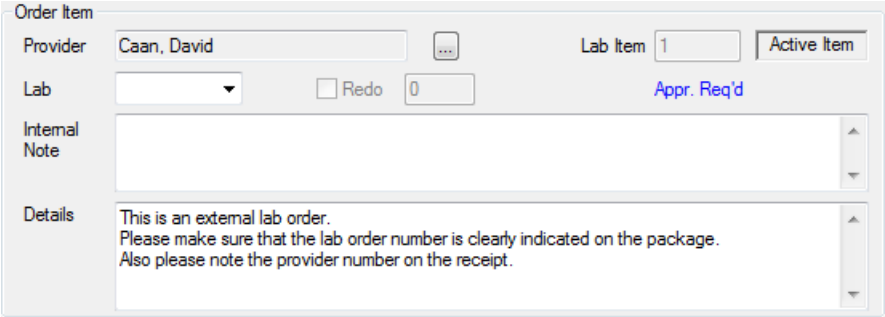
3. Click (Add a new Record).

   axiUm removes the hard return, causing the text to truncate.



Need axiUm to retain the format.

Enhancement: Now in the above scenario, axiUm retains the hard returns.



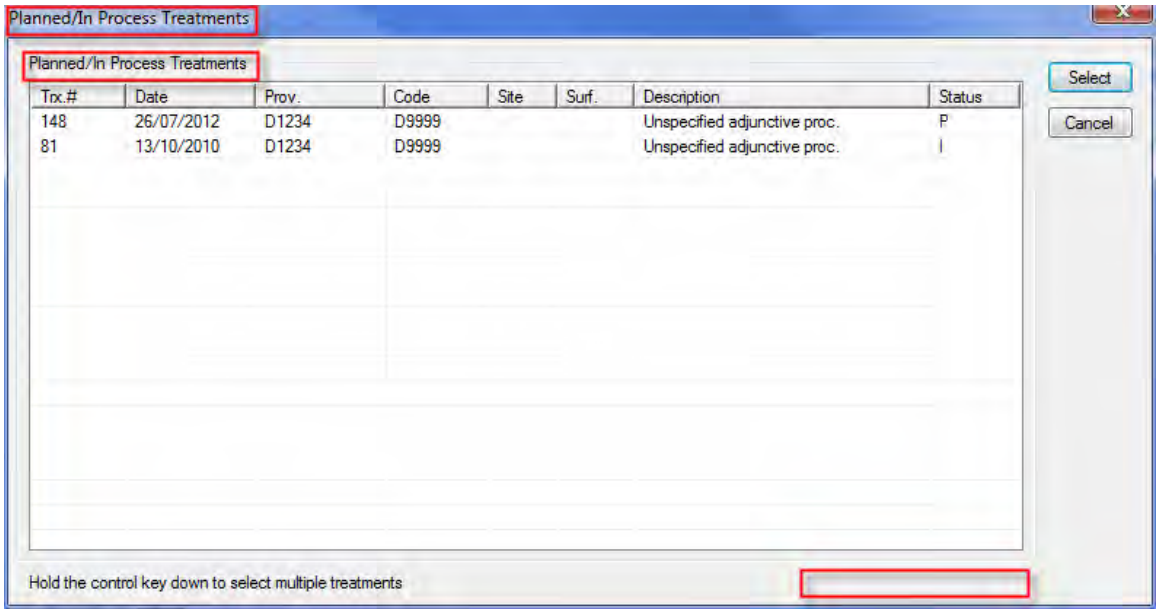
100167 – Improved the Planned/In Process Treatments window

Module: EHR ~ Planned/In Process Treatments window

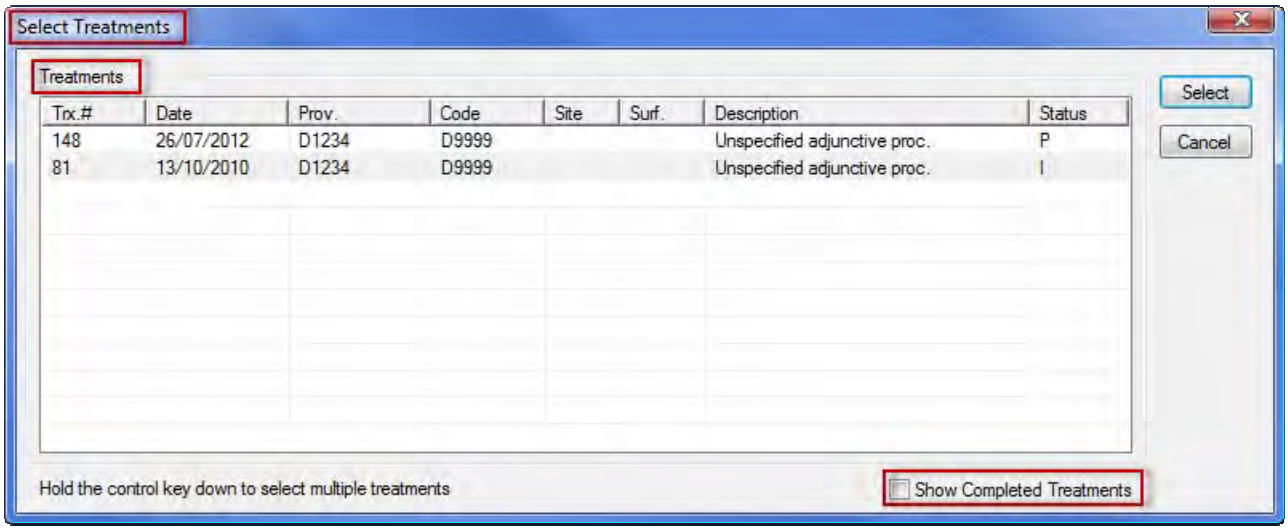
Issue: If a lab order is associated to a completed procedure, but you want to disassociate them and select a different completed procedure, you cannot do this from the Planned/In Process Treatments window. Need the ability to display completed lab procedure records and edit them from the Planned/In Process Treatments window.

Enhancement: Now has the ability to display completed lab procedure records and edit them from the Planned/In Process Treatments window. This window has the following changes:

Current:



New:

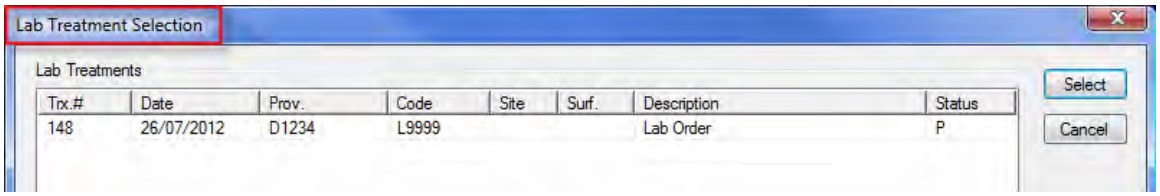


- The Planned/In Process Treatments window has been renamed the Select Treatments window.
- The Planned/In Process Treatments section has been renamed the Treatments section.
- Now displays the **Show Completed Treatments** checkbox (new). Selecting this checkbox includes completed lab procedure records in the list view.

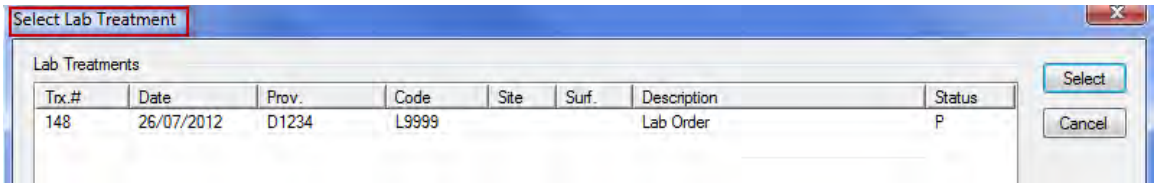
Also the following screen elements have changed:

- The Lab Treatment Selection window has been renamed the Select Lab Treatment window (changed).

  Current:

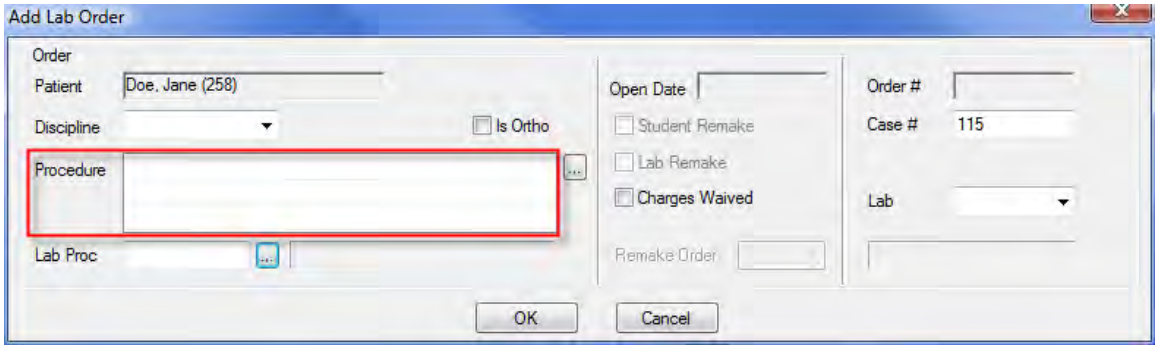


New:

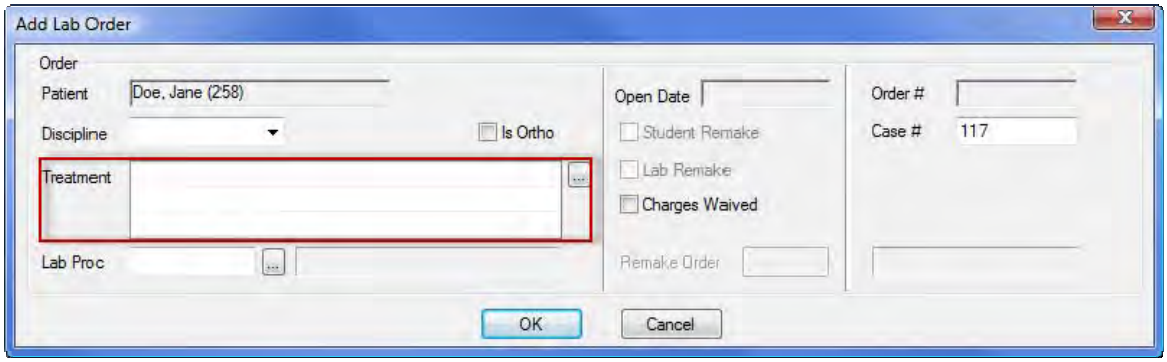


- In the Add Lab Order window, the Procedure field has been renamed the Treatment field (changed).

Current:

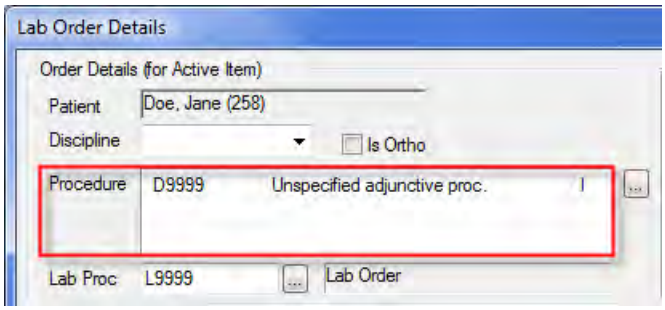


New:

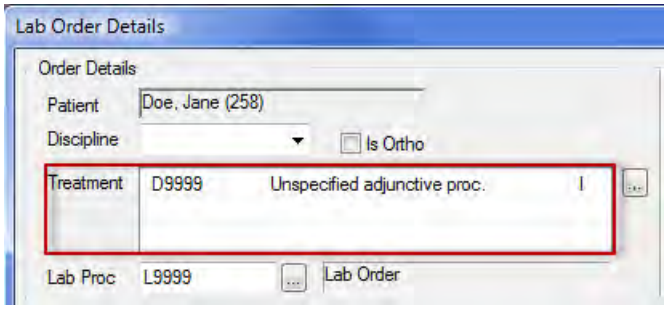


- In the Lab Order Details window, the Procedure field has been renamed the Treatment field (changed).

Current:



New:



100254 – New status for lab orders

Module: EHR – Labs tab

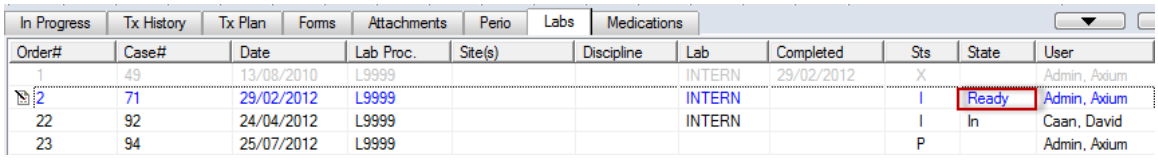
Issue: Currently, if the lab order displays the In status, this could mean that the lab order was:

- approved to be sent to the lab, but has not been sent
- sent to the lab and has now returned to the clinic

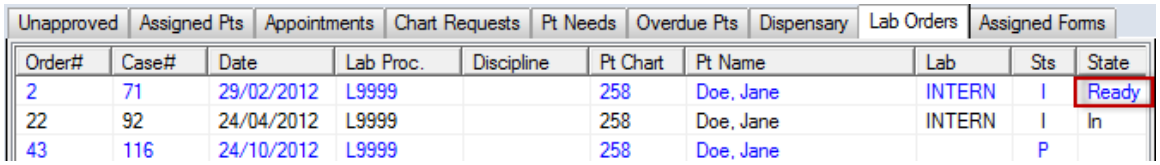
Need axiUm to differentiate these two statuses.

Enhancement: Fixed. Now if the lab order was approved to be sent to the lab (but has not been sent), axiUm displays the status Ready (new). If it has been sent to the lab, the Status will continue to display Out and if it has been returned to the clinic, the State will continue to display In. This is displayed in the following windows:

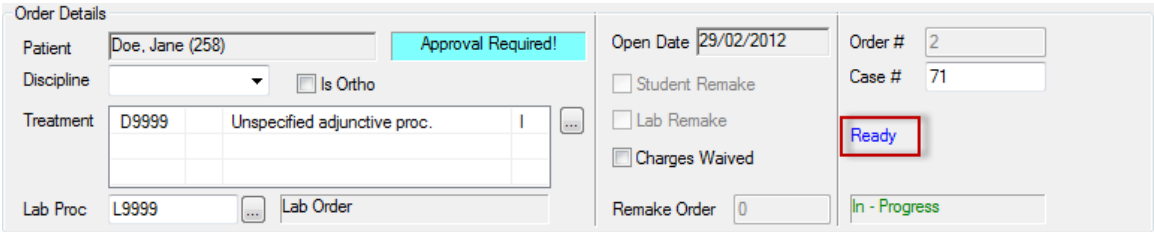
- EHR window's Labs tab



- Personal Planner window's Lab Orders tab



- Lab Order Details window



100935 – Ability to disable auto-created treatment history notes

Module: EHR – Labs tab

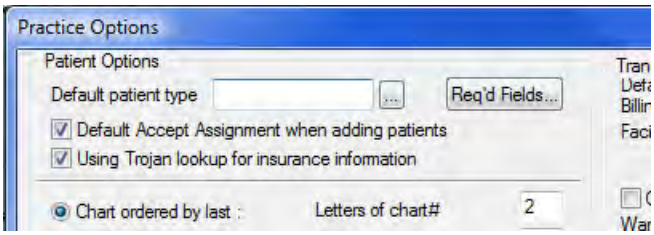
Issue: When a lab order is made In Progress or Completed, Redone or Reopened, axiUm automatically creates a treatment history note. Need the ability to disable these auto-generated notes.

Enhancement: Now has the ability to disable auto-generated treatment notes for selected lab order statuses.

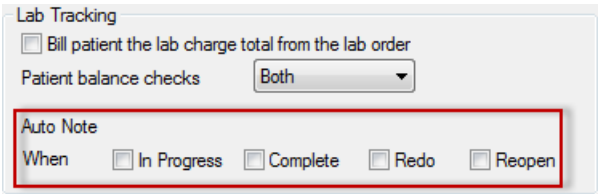
Setup:

1. Open the Practice Options window.

   Go to Maintenance window – Office tab – Practices icon – Practices window – (Practice Options).



2. Go to the Lab Tracking section.
   There is a new Auto Note sub-section (new).



3. Select from the following checkboxes:

   - In Progress: This checkbox, if selected, indicates that axiUm automatically creates a lab order note and displays it in the EHR window's Tx History tab when you change the lab order status to In-Progress. For example, "LD2750: Order 1922 on site(2) 20,

Item 1: Lab is In-Progress". This checkbox, if deselected, indicates that no note will be created in the EHR window's Tx History tab.

- Complete: This checkbox, if selected, indicates that axiUm automatically creates a lab order note and displays it in the EHR window's Tx History tab when you change the lab order status to Completed. For example, "LD2750: Order 1922 on site(2) 20, Item 1: Lab is Completed" This checkbox, if deselected, hides this note from the EHR window's Tx History tab.

- Redo: This checkbox, if selected, indicates that axiUm automatically creates a lab order note and displays it in the EHR window's Tx History tab when you redo a lab order. For example, "LD2750: Order 1922 on site(2) 20, Item 1: Lab needs to be Redone" This checkbox, if deselected, hides this note from the EHR window's Tx History tab.

- Reopen: This checkbox, if selected, indicates that axiUm automatically creates a lab order note and displays it in the EHR window's Tx History tab when you reopen a lab order. For example, "LD2750: Order 1922 on site(2) 20, Item 1: Reopen of completed Lab Order" This checkbox, if deselected, hides this note from the EHR window's Tx History tab.

104137 – Lab Treatment list identifies suspended treatments

Module: EHR ~ Planned/In Process Treatments window

Issue: When you create a lab order, axiUm displays the Planned/In Process Treatments window. This window includes suspended treatment records, but there is no indicator for suspended treatments.

Steps to replicate:

1. Go to the EHR window's Labs tab.

2. Click (Create a new record).
   axiUm displays the Add Lab Order window.

3. Go to the Treatments list view (changed, this was previously called the Procedures list view; for information see 100167), and click (ellipsis).
   axiUm displays the Select Treatments window (changed, this was previously called the Planned/In Process Treatments window; for information see 100167),

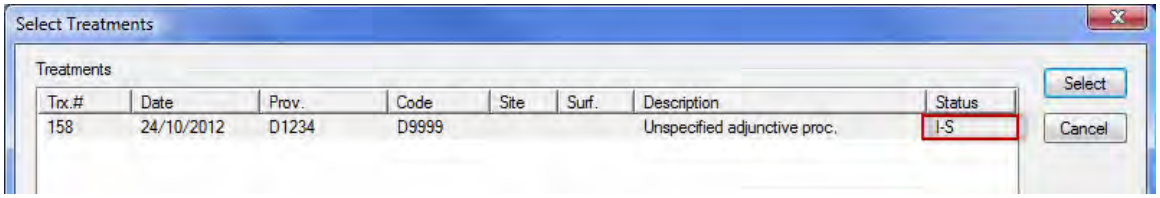
   This window displays all planned and in-process treatments on this patient's record that you can select to associate to this lab order. This window also includes suspended treatments, and if you want to avoid selecting these, there is no indicator for this status.

   Note: To suspend a treatment, go to Transactions window – Treatment tab – Treatments tab, and from the list view highlight an in-process treatment record and select the Suspend In Process Tx right-click option.

Enhancement: Fixed so that in the above scenario, the Select Treatments window behaves as follows:

- If a suspended treatment record is not associated to a lab order, axiUm hides these treatment records from the list view.

- If a suspended treatment is associated to a lab order, axiUm shows the treatment record in the list view and the Status column displays I-S (new).



105653 – Ability to answer "Don't Know" in EPR forms

Module: EHR – Forms tab

Issue: There are two issues:

- Issue 1: Need the ability to indicate "Don't Know" as a valid answer to an EPR form's Yes/No question. Currently, you must leave these questions blank, and this can be ambiguous. It could mean you or the patient did not know the answer, or that you did not ask the question. A "Don't Know" response will clearly indicate that the question was asked, but the answer was unknown.
- Issue 2: Currently you must specifically select (using the associated right-click option) whether you want to clear an attachment or a spreadsheet. Need a right-click option that clears the answer regardless of the type of question selected.

Enhancement: The following enhancements have been made:

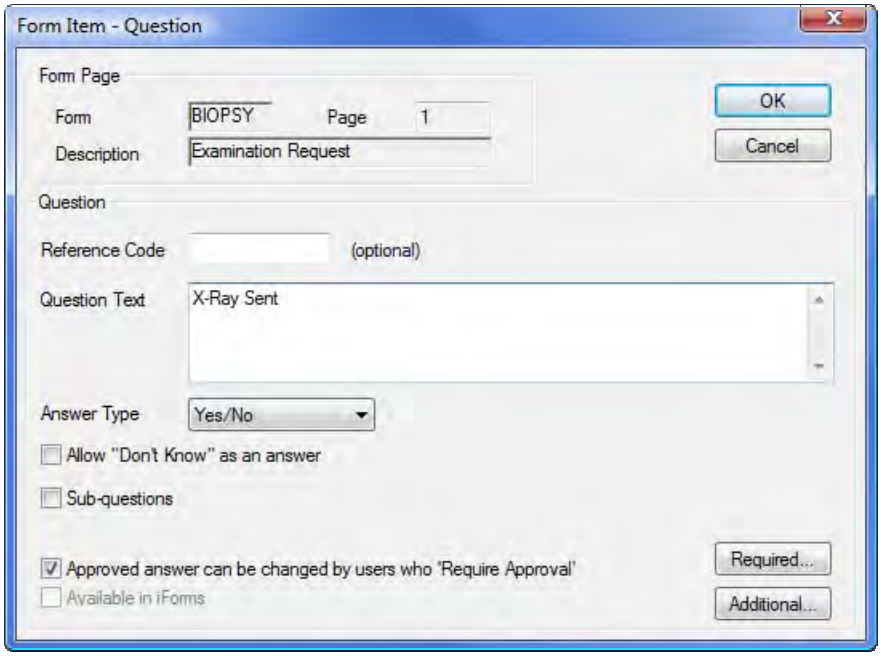
Enhancement 1:

Now in the EPR forms when you see a Yes/No type question, you can select to answer "Don't Know".

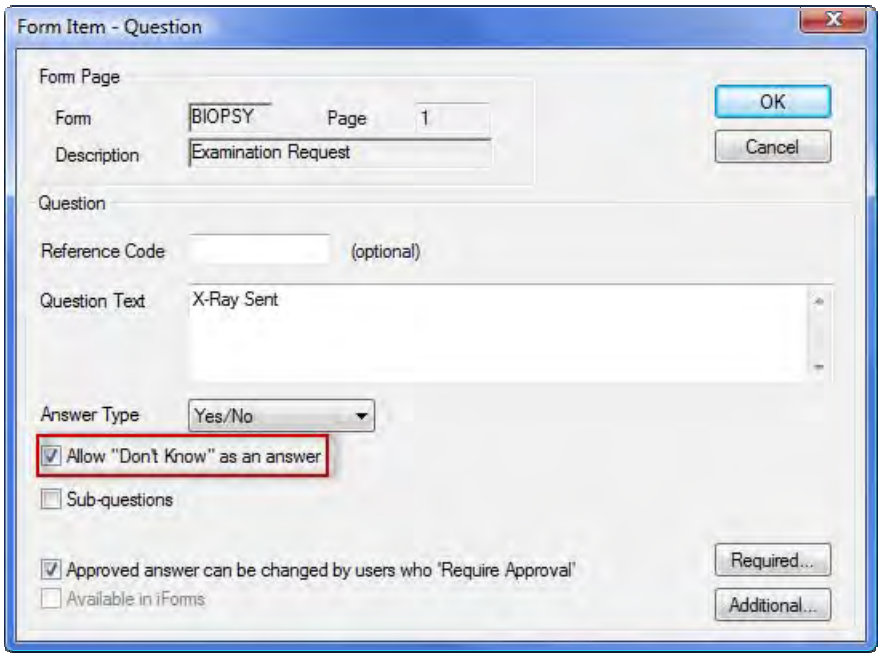
Setup:

1. Open any of the form item windows below:
    - Form Item – Question window (changed)
    - Form Item – Additional Info window (changed)
    - Form Item – Spreadsheet Row window (changed)

    For our example, we will open the Form Item – Question window.
    Go to Maintenance window – EHR tab – EPR Form Setup icon – EPR Form Setup window – (Form Definition) – Form Pages window – (Form Page Definition) – Form Page Definition window – select a Yes/No type question – (Edit Record).



2. Select the **Allow "Don't Know" as an answer** checkbox (new).
   Note: This checkbox is displayed if the Answer Type drop-down field displays the Yes/No option.

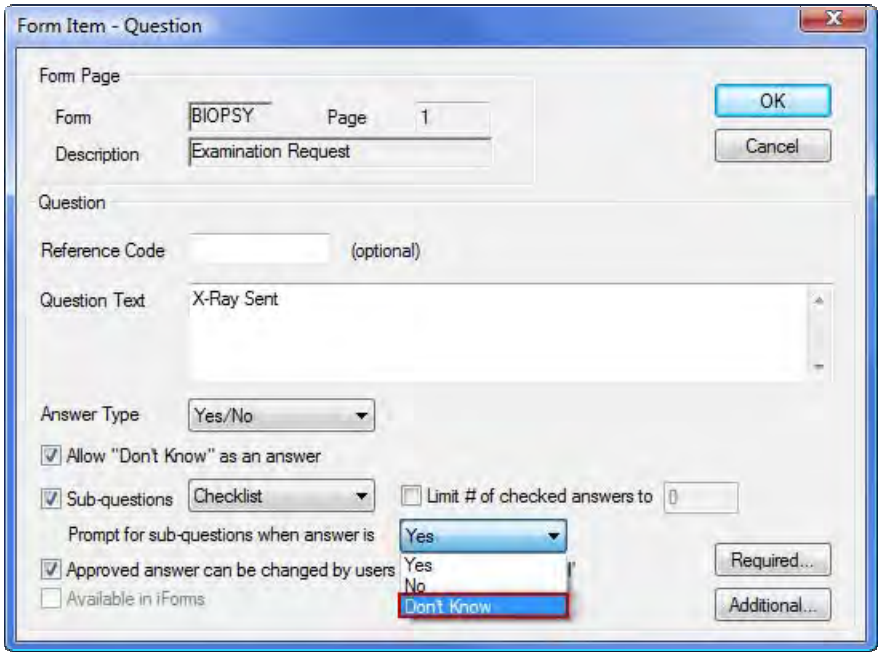


Note: Additional Info sub-questions can also be set up to allow "Don't Know" as an answer.

You may now also set up a form question to prompt for sub-questions when the answer is "Don't Know".

2.1. Select the Sub-questions checkbox to display additional fields.

2.2. Go to the **Prompt for sub-questions when answer is** drop-down field and select the Don't Know option (new). This option is displayed if the **Allow "Don't Know" as an answer** checkbox is selected.

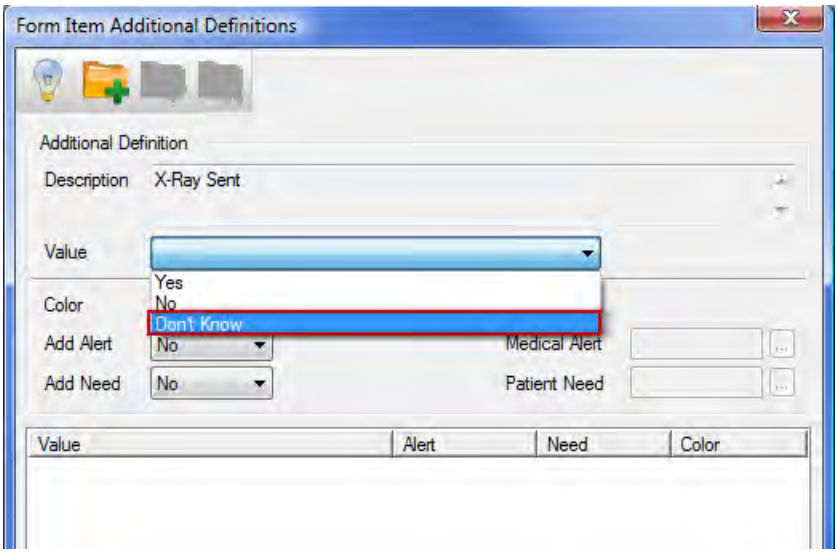


Note: For information on the **Prompt for sub-questions when answer is** drop-down field's Yes option and No option, see 127260.

Note: You may now also add patient alerts or patient needs based on an answer of "Don't Know".

2.3. Click the Additional button.

axiUm displays the Form Item Additional Definitions window.



2.4. From the Value drop-down field, select the Don't Know option (new).

2.5. Click (Add a new Record).
axiUm saves the information and displays the new record in the list view.

2.6. Click (close).
axiUm closes the Form Item Additional Definitions window and returns to the Form Item - Question window.

3. Click the OK button.
axiUm saves the changes, closes the Form Item - Question window, and returns to the Form Page Definition window.

4. Click (close).
axiUm closes the Form Page Definition window and returns to the Form Pages window.

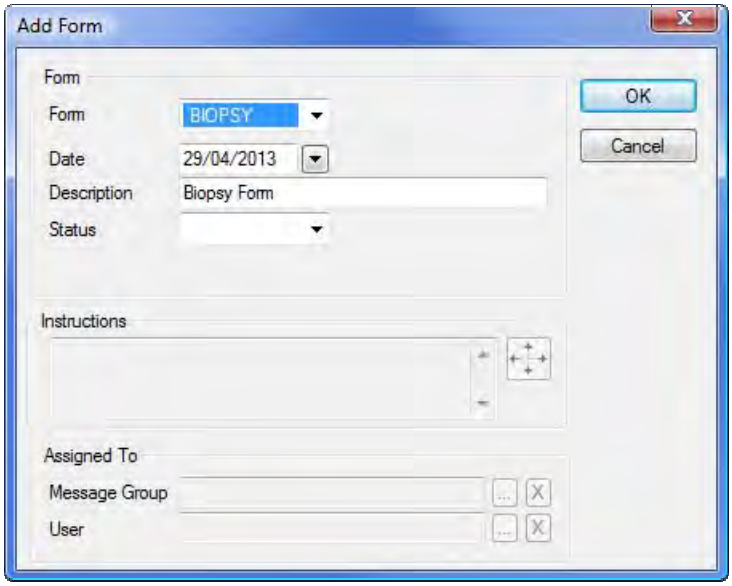
5. Click (close).
axiUm closes the Form Pages window and returns to the EPR Form Setup window.

6. Click (close).
axiUm closes the EPR Form Setup window and returns to the Maintenance window.

Usage:

1. Go to the EHR window's Forms tab.

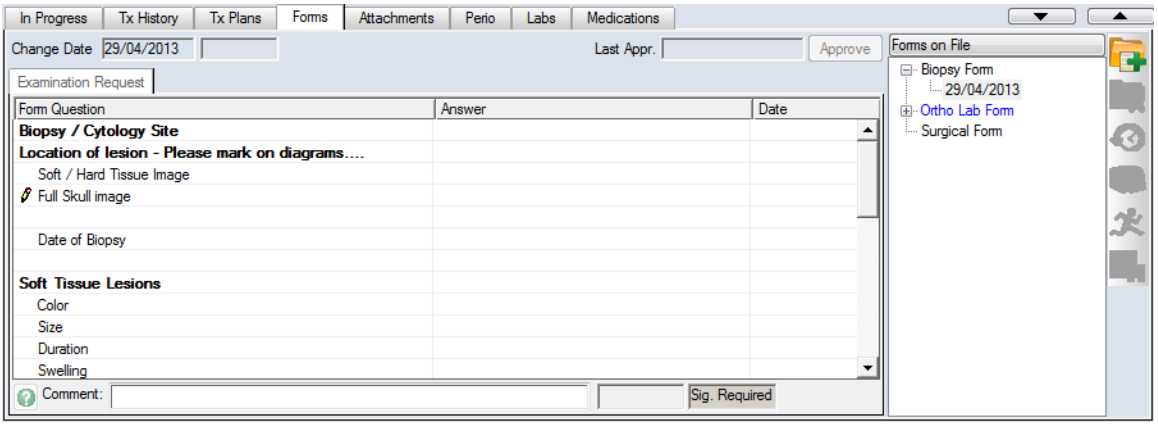
2. Click (Create a new Record).
axiUm displays the Add Form window.



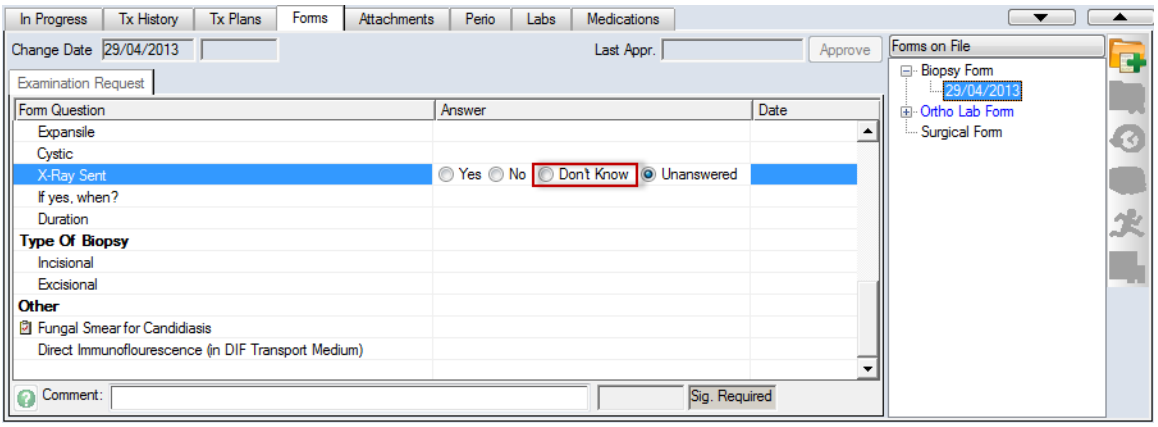
3. From the Form drop-down field, select the form you set up earlier.

4. Click the OK button.

   axiUm closes the Add Form window and returns to the EHR window. The selected form is displayed in the Forms tab.



5. From the list view, highlight the Yes/No question you set up earlier.



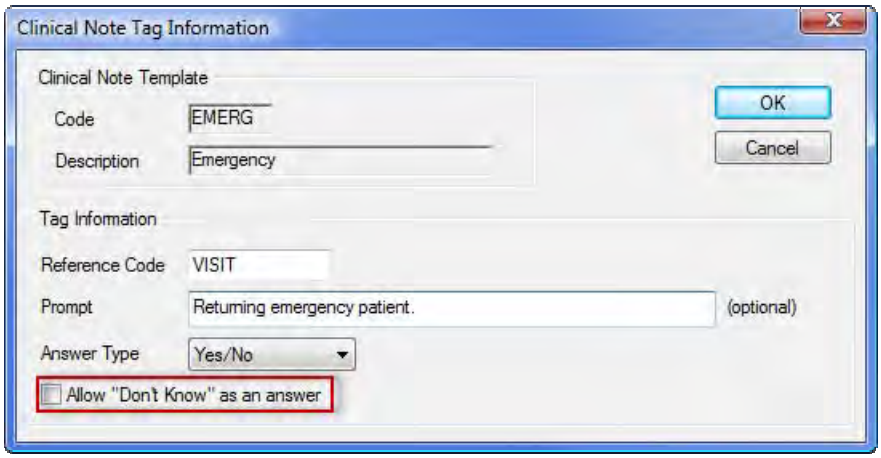
6. Select the Don't Know option.

Also, in addition to the EPR forms, you can select a "Don't Know" answer to Yes/No questions in template notes.

Setup:

1. Open the Clinical Note Tag Information window.

   Go to Maintenance window - EHR tab - Clinical Note Codes icon - Clinical Note Codes List window - Type drop-down field - Template Notes option - highlight item from list - (Edit Record) - Clinical Note Template window - select a tag - Edit Tag button.



2. Select the **Allow "Don't Know" as an answer** checkbox (new).

3. Click the OK button.
   axiUm saves the changes, closes the Clinical Note Tag Information window, and returns to the Clinical Note Template window.

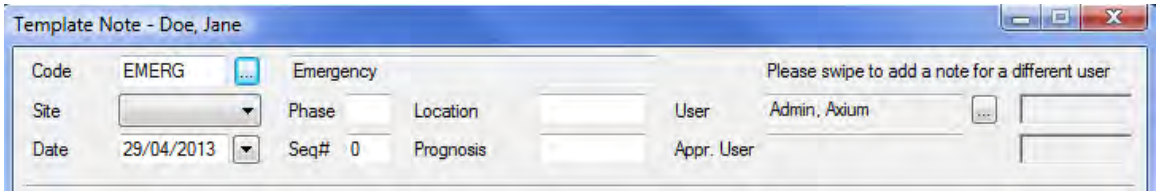
4. Click (close).
   axiUm closes the Clinical Note Template window and returns to the Clinical Note Codes List window.

5. Click (close).
   axiUm closes the Clinical Note Codes List window and returns to the Maintenance window.

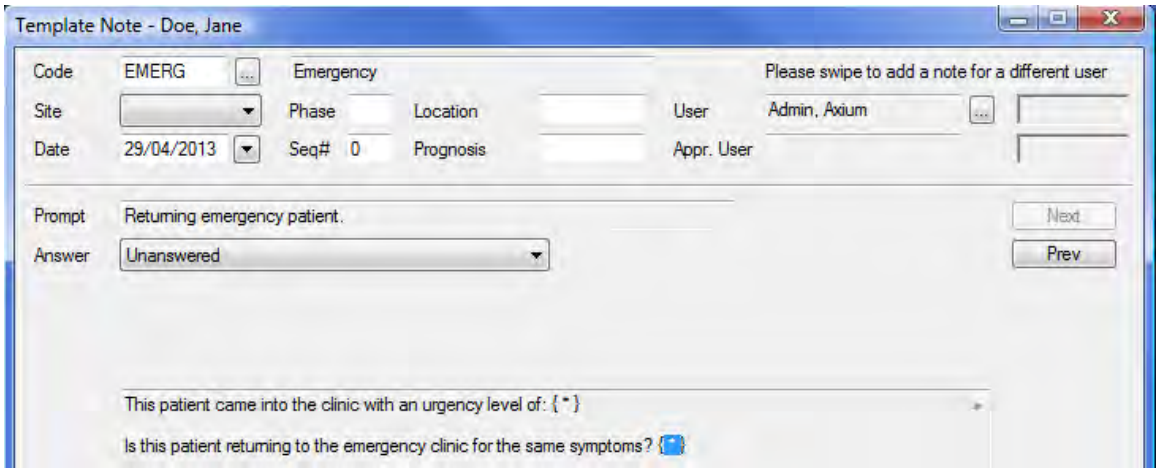
Usage:

1. Open the Template Note window.
   Go to EHR window – Tx History tab – (Add a new Note) – Select Note Type window – Select the Template Note option – OK button.

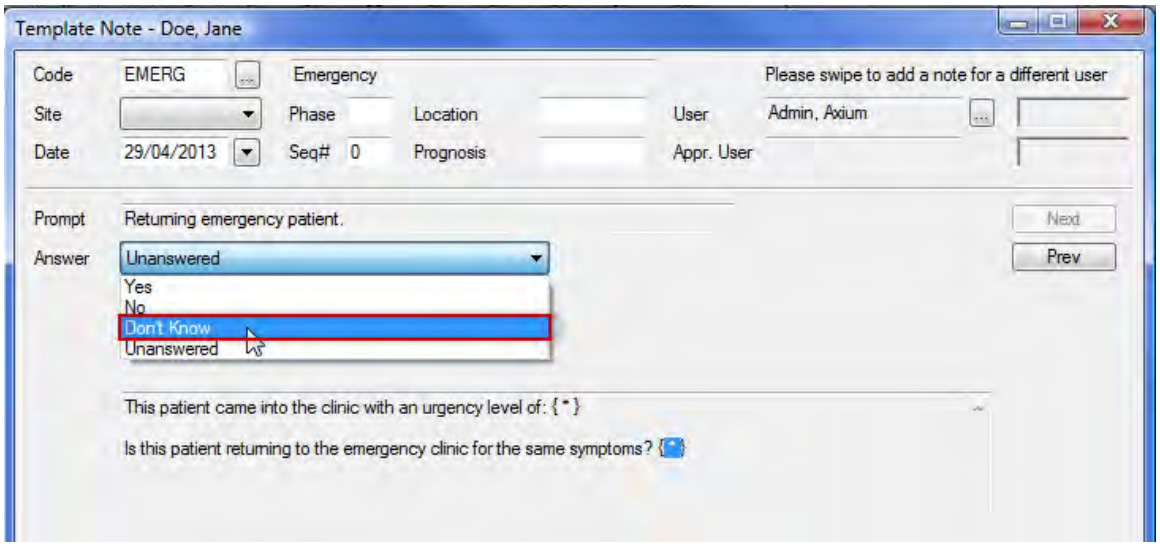
2. From the Code field, enter the code of the template note set up earlier.



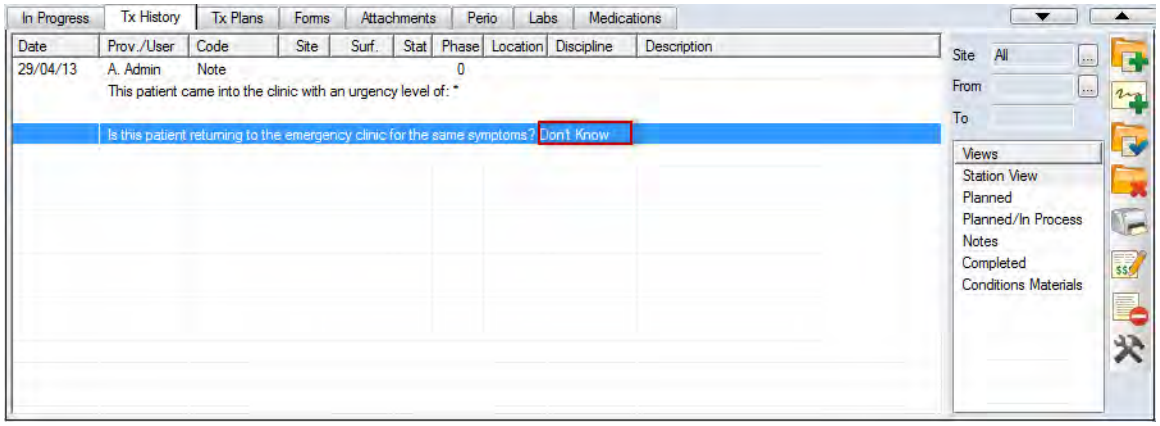
3. From the text display, highlight the tag containing the Yes/No answer from your setup.



4. Click on the Answer drop-down field.
   axiUm displays the Don't Know option (new).



5. Click the OK button.
   axiUm saves your answer, closes the Template Note window, and returns to the EHR window.



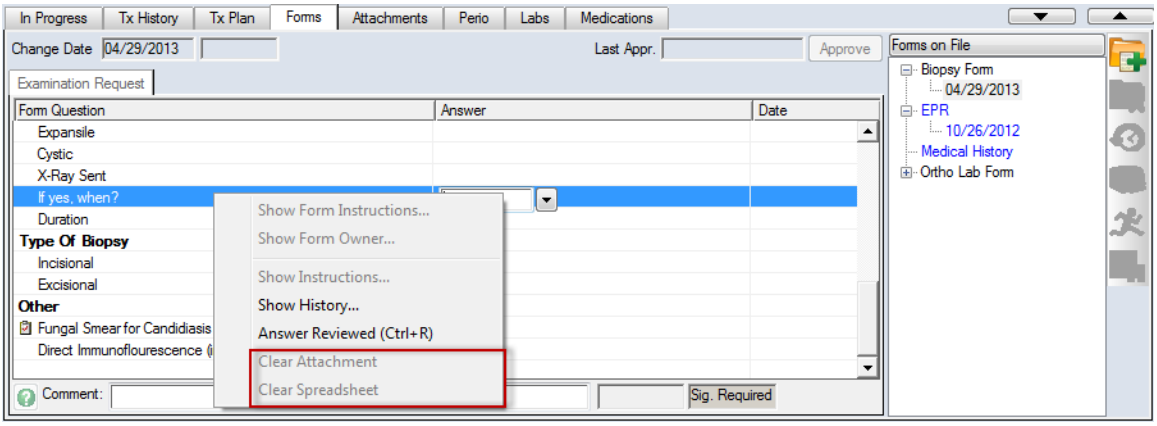
axiUm displays the “Don’t Know” answer in the Tx History tab.

Enhancement 2:

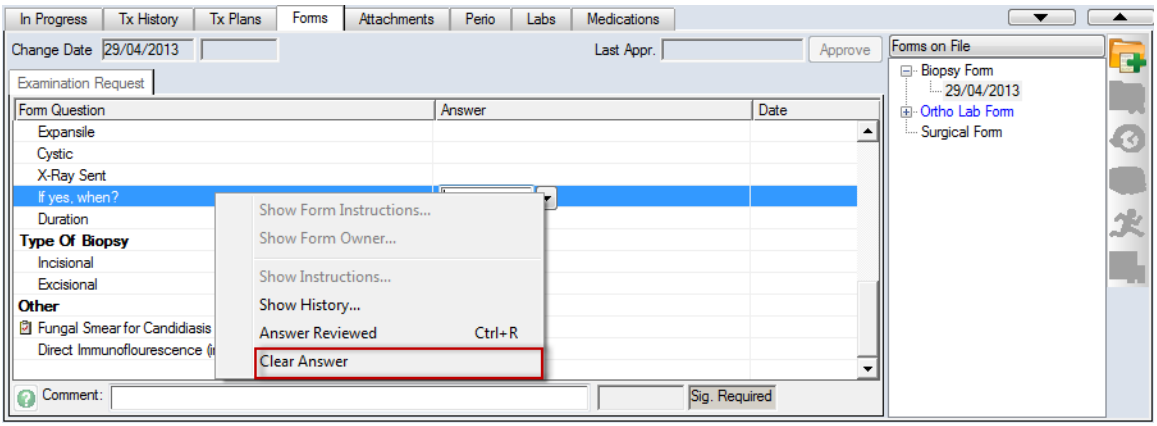
Now when you view answers entered in an EPR form, axiUm displays a Clear Answer right-click option (new). This replaces the following right-click options:

- Clear Spreadsheet (deprecated)
- Clear Attachment (deprecated)

Current:



New:

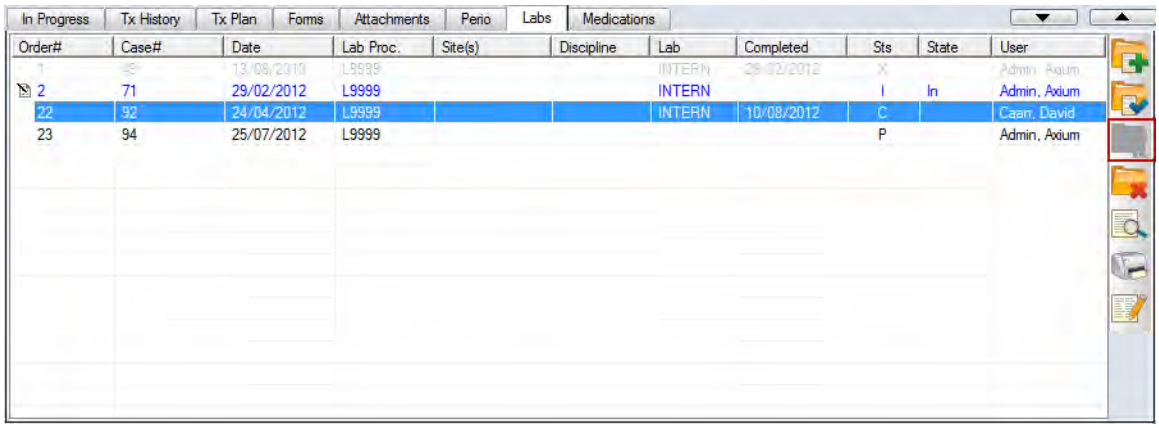


Selecting the Clear Answer right-click option (new) clears the answer to the highlighted question.

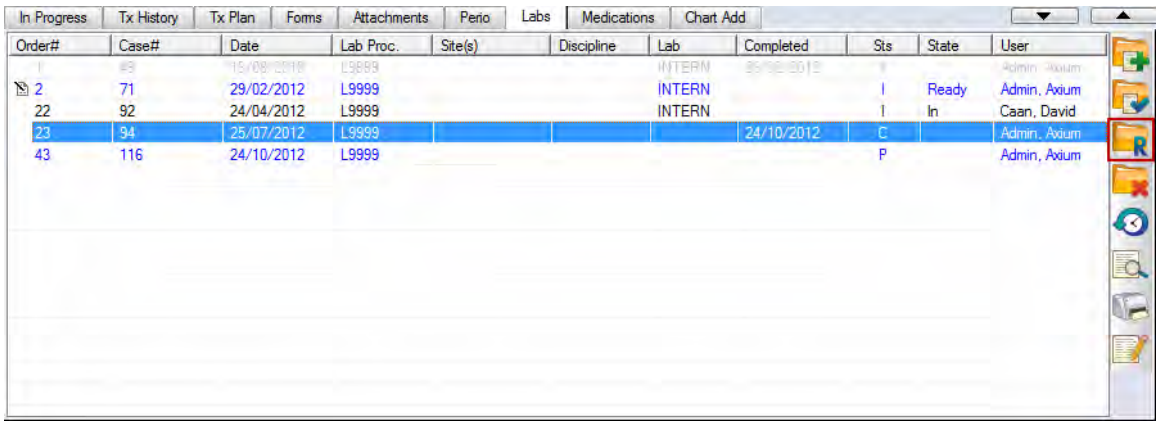
119794 - Ability to remake completed lab orders

Module: EHR ~ Remake Lab Order window

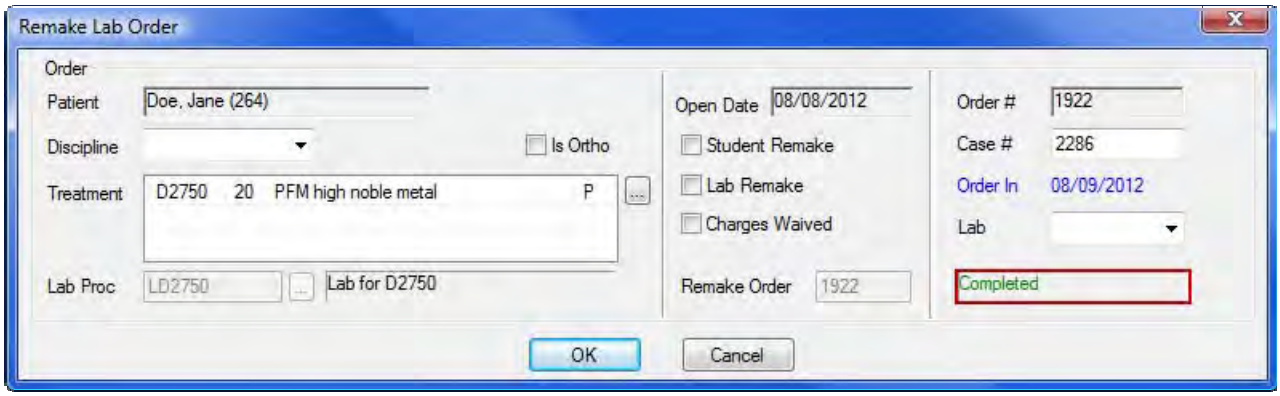
Issue: Currently, you cannot remake a completed lab order. Need the ability to remake completed lab orders.



Enhancement: Now in the Lab Tracking window's Labs tab, if you select a lab order record with a Completed status, (Remake Lab Order) is enabled.



Clicking (Remake Lab Order) displays the Remake Lab Order window displaying the details of the completed lab order. The Student Remake and Lab Remake checkboxes are enabled so that if in the original lab order you selected the incorrect checkbox, you can change that now.



Note: If a lab order has the status Closed (in the EHR window's Lab tab the Sts column displays X), you cannot remake the lab order. This is to prevent users from taking the completed lab order (i.e. the physical item), inserting it into patient's mouth, and then later on deciding to remake it.

120546 – Improved behavior of treatment consent warnings

Module: EHR ~ Initial Visit Treatment Consent Missing Warning window (new), Complete Treatment Consent Missing Warning window (new)

Issue: If you, (a user who requires approval for completed treatments) change a treatment status from P > I, P > C, or I > C, axiUm displays the Treatment Consent Missing Warning window during the approval process which is too late as the patient may have already left the chair. This could result in treatments being completed without consent. Need axiUm to display this warning earlier, when the treatment status is changed.

Enhancement: Now if you (a user who requires approval for completed treatments) change a treatment status, axiUm displays one of two new consent warning windows:

- Initial Visit Treatment Consent Missing Warning window (new)
  This window displays when you change the treatment status from P > I.

- Complete Treatment Consent Missing Warning window (new)
  This window displays when you change the treatment status from P > C or I > C.

Notes:

- The behavior of consent warnings on approval is retained (current behavior).
- When you add a completed or in-process treatment, axiUm skips these new warnings.

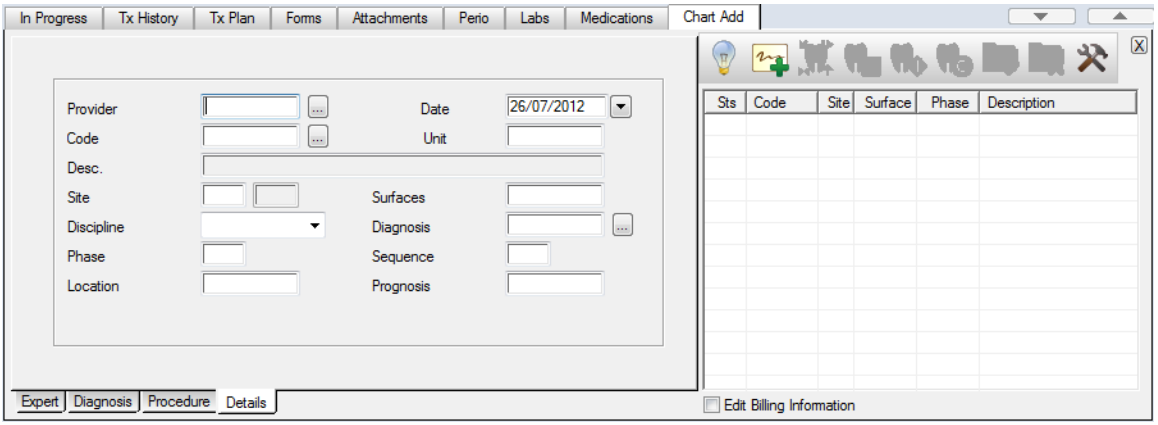
120709 – Lab order records display diagnosis codes

Module: EHR – Tx History tab

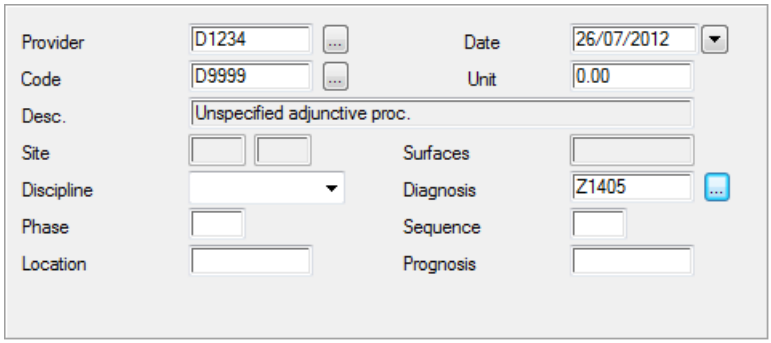
Issue: When you add a diagnosis code to a lab procedure, axiUm does not transfer this information to the associated lab order.

Steps to replicate:

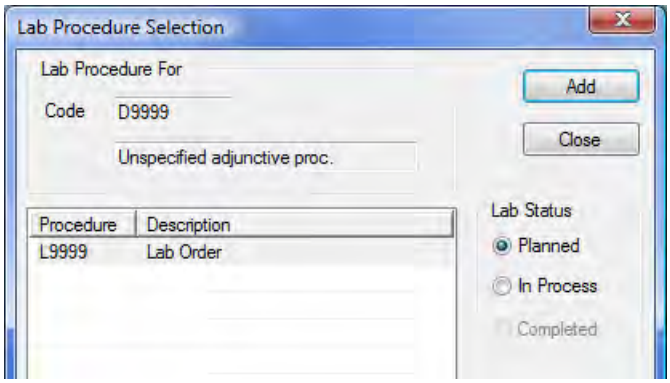
1. Go to the EHR window's Chart Add tab.



2. Enter a procedure that requires a lab. For our example, we will enter the following:
   - Code: Unspecified adjunctive proc. This should be a code that requires a lab (i.e. D6066)
   - Diagnosis: Z1405, Missing Teeth



3. Click (Add Planned Tx).
   axiUm displays the Lab Procedure Selection window.

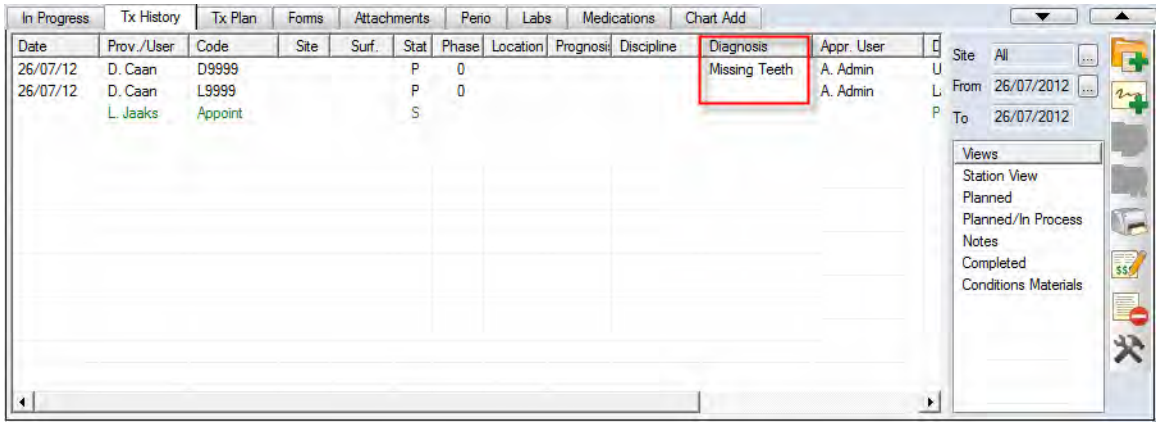


4. Click the Add button.
   axiUm saves the original procedure and the lab procedure and closes the Lab Procedure Selection window, and returns to the EHR window.

   axiUm displays both procedures in the Chart Add tab's list view.

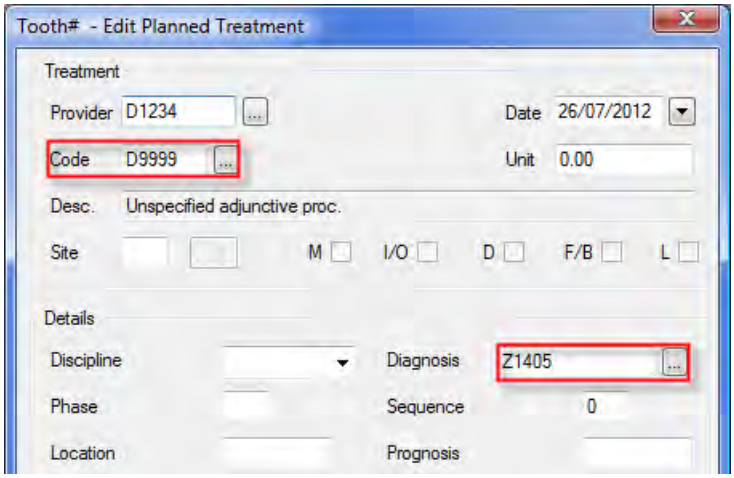
Sts	Code	Site	Surface	Phase	Description
P	D9999			0	Unspecified adjunctive p
P	L9999			0	Lab Order

5. Click on the Tx History tab.
   axiUm displays both procedures.



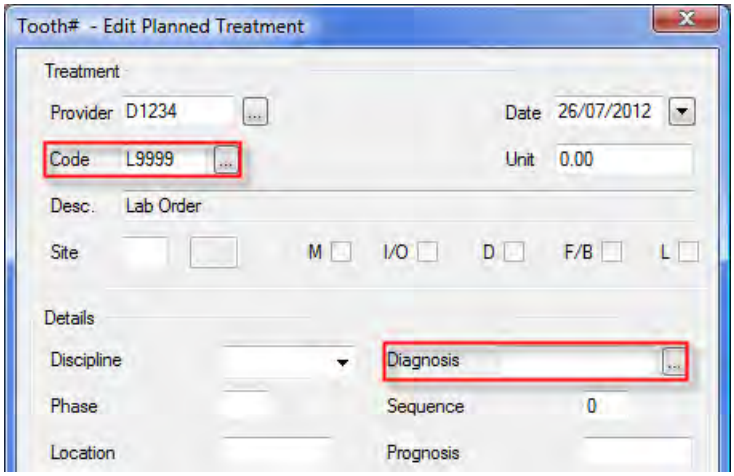
Issue 1: The Diagnosis column displays the diagnosis description for the main procedure (i.e. D6066), but not for the associated lab procedure (i.e. L9999).

6. From the list view, double-click on the main procedure (i.e. D6066).
   axiUm displays the Edit Planned Treatment window, and the Diagnosis field displays the diagnosis code we entered (i.e. Z1405).



7. Click (close).
   axiUm closes the window and returns to the EHR.

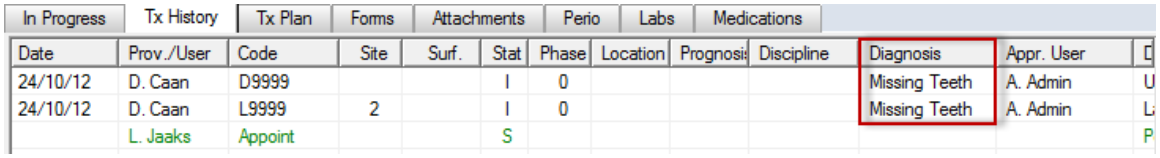
8. From the list view, double-click on the procedure (i.e. L9999).
   axiUm displays the Edit Planned Treatment window.



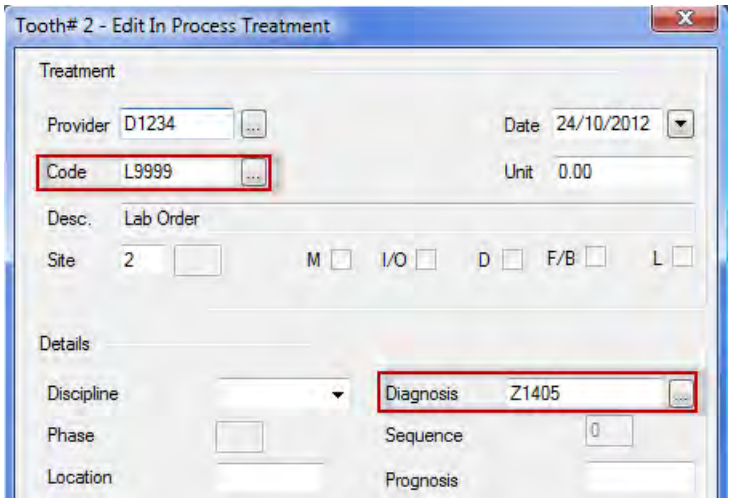
Issue 2: The Diagnosis field is blank. It should display the diagnosis code (i.e. Z1405).

Enhancement: Fixed so that in the above scenario:

- Enhancement 1: The Tx History tab's list view displays the diagnosis description in the Diagnosis column.



- Enhancement 2: Now when you open an edit treatment window (Edit Planned Treatment window, Edit In Process Treatment window, and the Completed Treatment window), the Diagnosis field displays the diagnosis code.



126673 – Improved eRx approval process

Module: EHR – Medications tab

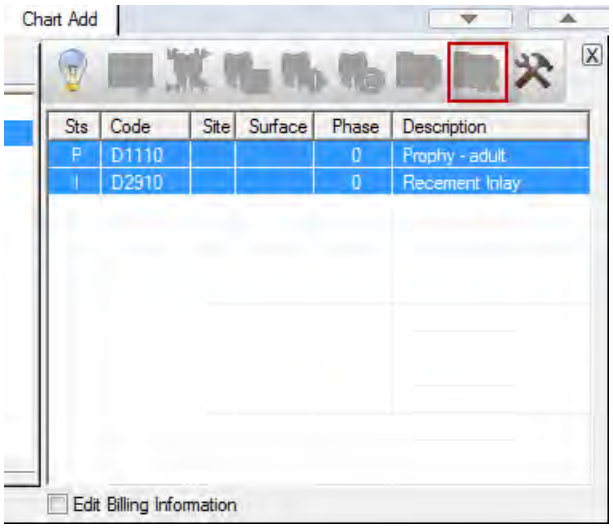
Issue: With the current eRx workflow, the instructor must log onto axiUm to approve prescriptions entered by students. Need the ability for instructors to approve and send eRx prescriptions while students remain logged onto axiUm.

Enhancement: Now has the ability for instructors to approve and send prescriptions while the student remains logged onto axiUm. When you go to the EHR window's Medications tab and click (Create a new Record) to display a list of options, there is an **axiUm eRx Instructor Sign-In** option (new). Selecting this option lets you sign onto eRx.

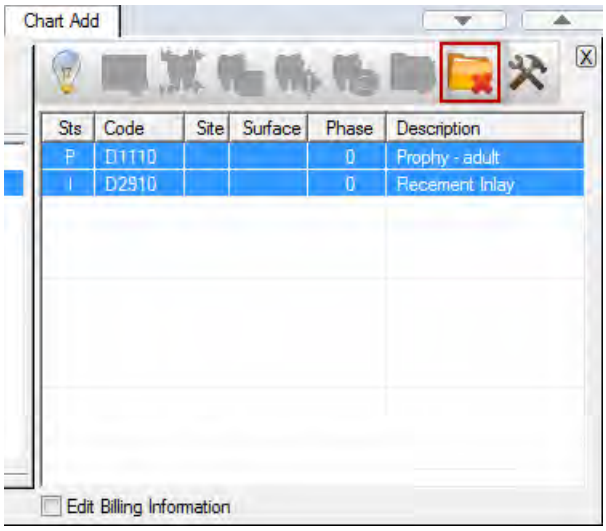
126719 - Ability to multi-delete records in the Chart Add tab

Module: EHR – Chart Add tab

Issue: In the Chart Add tab's list view, you can delete a single record by highlighting it and clicking (Delete Record). However, if you highlight multiple records, axiUm disables this icon, preventing you from multi-deleting. Need the ability to multi-delete.



Enhancement: Now you can multi-delete records in the Chart Add tab's list view. When you highlight multiple records, the (Delete Record) icon remains enabled. Clicking this icon deletes the selected records.



127260 – Prompt for sub-questions when answer is No or Don't Know

Module: EHR – Forms tab

Issue: Currently, EPR forms with Yes/No answers can have sub-questions but only if the answer is Yes. Need the additional ability to display sub-questions when the answer is either Yes, No or Don't Know.

Enhancement: Now you can set up a form to display sub-questions when the answer is either Yes, No or Don't Know.

Note: See E105653 for more information on adding "Don't Know" as a valid answer to a Yes/No question.

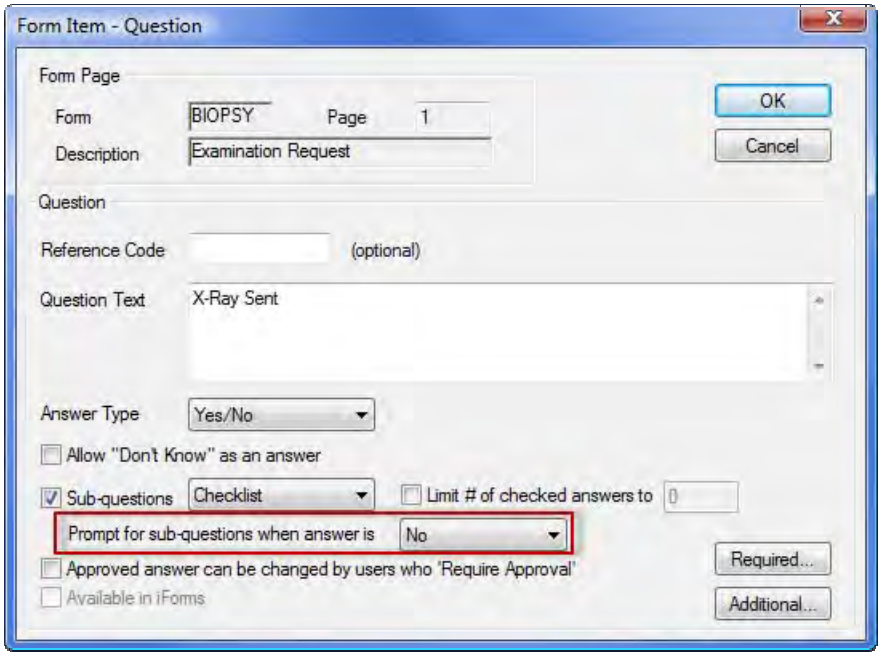
Setup:

1. Open the Form Item – Question window.
   Go to Maintenance window – EHR tab – EPR Form Setup icon – EPR Form Setup window - (Form Definition) – Form Pages window - (Form Page Definition) – Form Page Definition window – select a Yes/No type question - (Edit Record).

2. From the Answer Type drop-down field, select the Yes/No option.

3. Select the Sub-questions checkbox.
   axiUm displays additional fields.

4. Go to the **Prompt for sub-questions when answer is** drop-down field (new) and select the No option.

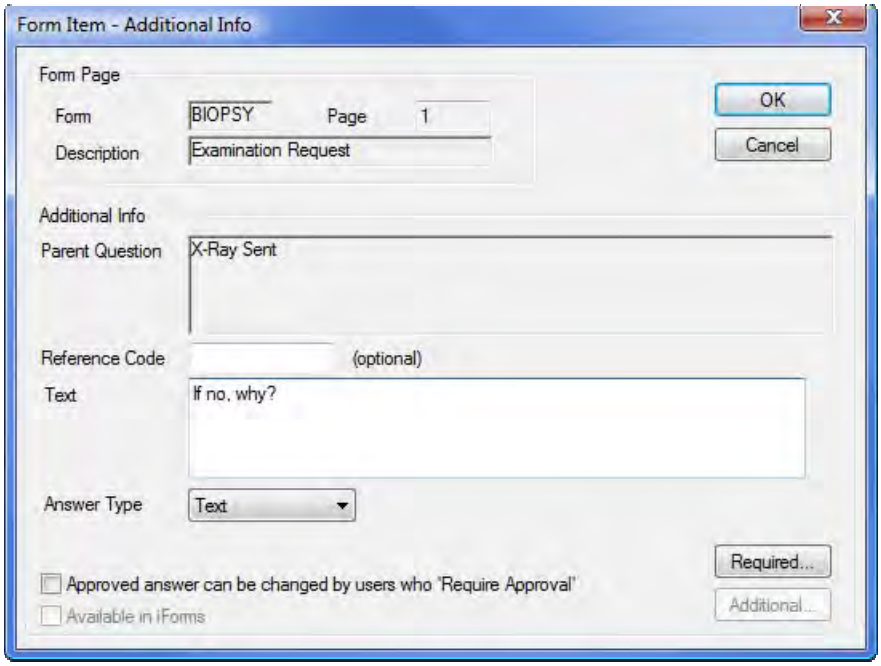


Note: For information on the **Prompt for sub-questions when answer is** drop-down field's Don't Know option, see 105653.

5. Click the OK button.

   axiUm saves the changes, closes the Form Item – Question window, and returns to the Form Page Definition window.

6. Create a sub-question for the above question. For our example, we will assume that an additional info- type sub-question was created for users to enter a text-type answer.



7. Click the OK button.

axiUm saves the changes, closes the Form Item – Question window, and returns to the Form Page Definition window.

8. Click (close).
   axiUm closes the Form Page Definition window and returns to the Form Pages window.

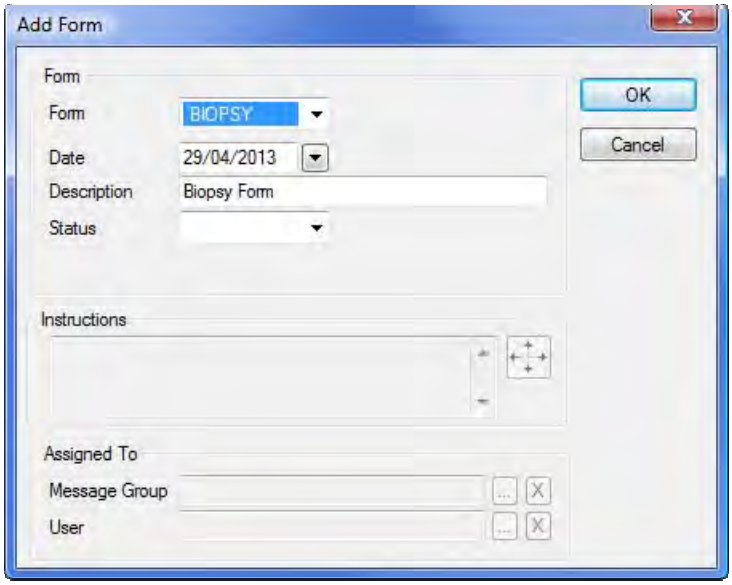
9. Click (close).
   axiUm closes the Form Pages window and returns to the EPR Form Setup window.

10. Click (close).
    axiUm closes the EPR Form Setup window and returns to the Maintenance window.

Usage:

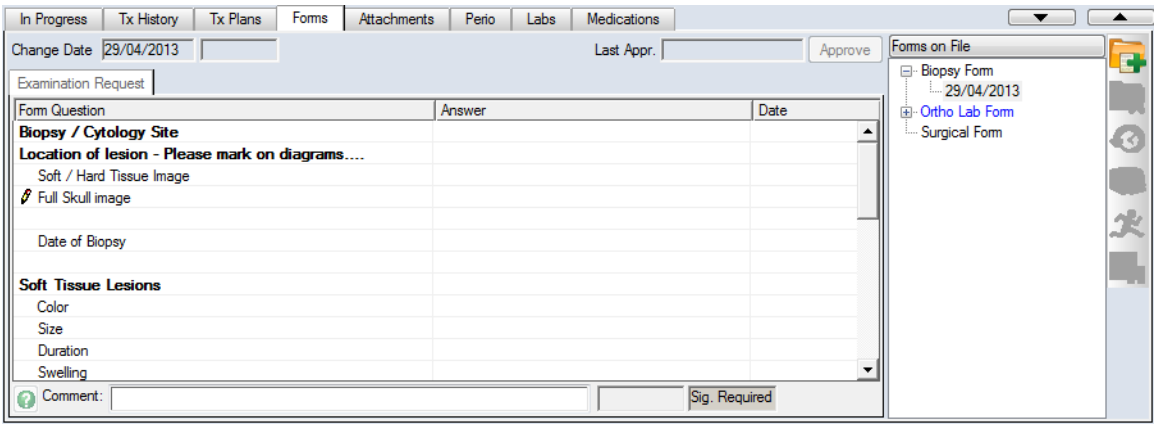
1. Go to the EHR window's Forms tab.

2. Click (Create a new Record).
   axiUm displays the Add Form window.

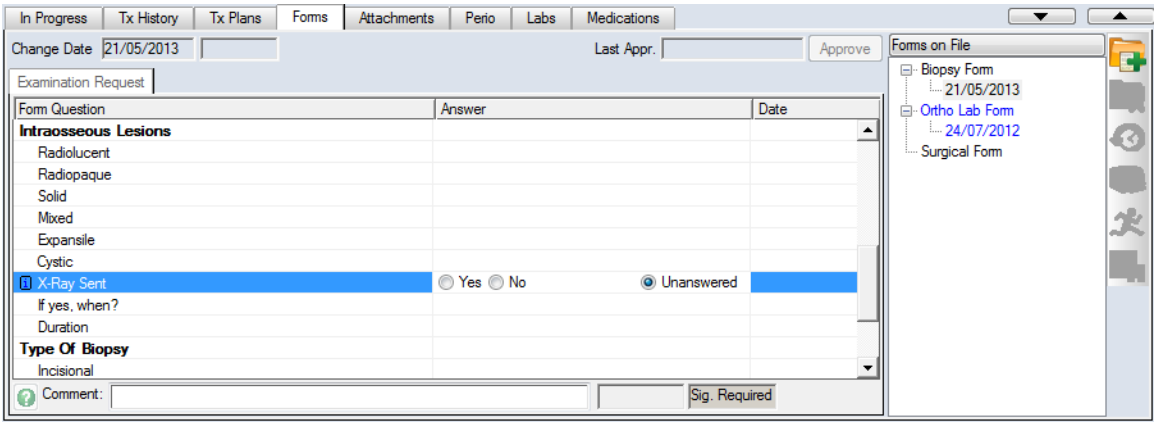


3. From the Form drop-down field, select the form you set up earlier.

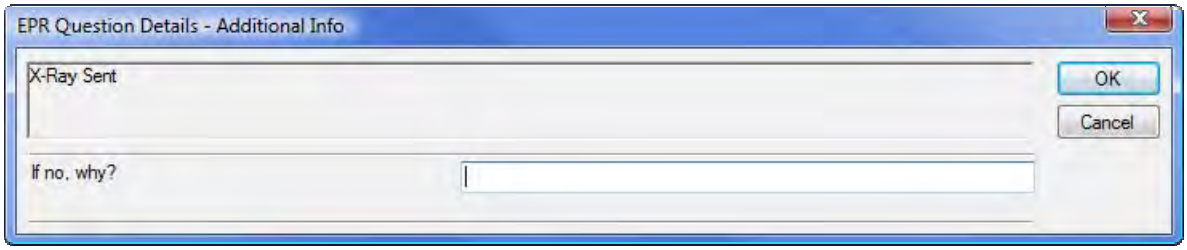
4. Click the OK button.
   axiUm closes the Add Form window and returns to the EHR window. The selected form is displayed in the Forms tab.



5. From the list view, highlight the Yes/No question you set up earlier.



6. Select the No option.
   axiUm displays any sub-questions or additional answers you set up.



Important: Do not reword the currently existing yes/no question in a way that may reverse the meaning. This will cause existing answers on the EPR form to appear incorrect. Instead, create a new question using the new wording.

127328 – Ability to view deleted medications & historic records

Module: EHR – Medications tab

Issue: There are two issues:

- Issue 1: Need the ability to display deleted medication records.

- Issue 2: Need the ability to view activity history for both medications and prescriptions.

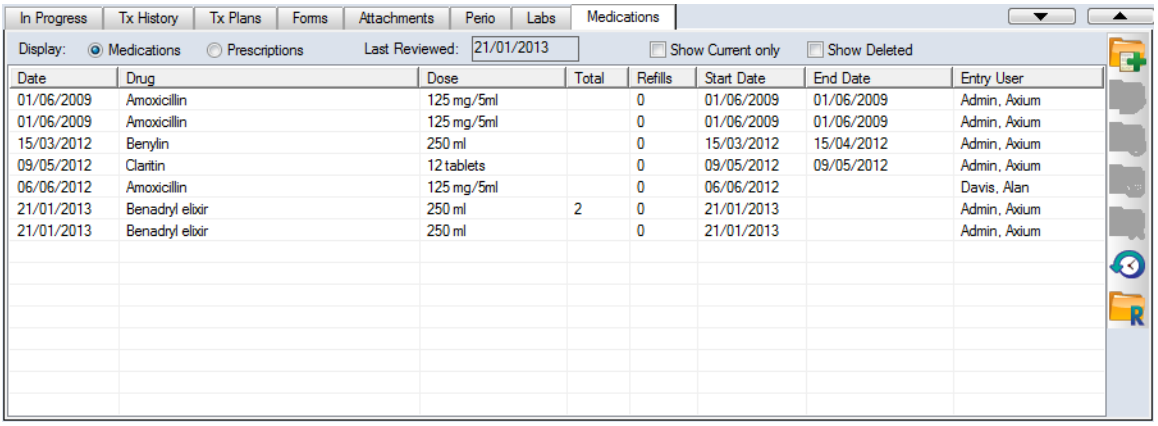
Enhancement: The following enhancements have been made:

Enhancement 1:
Now axiUm has the ability to display deleted medication records in the Medications tab's list view.

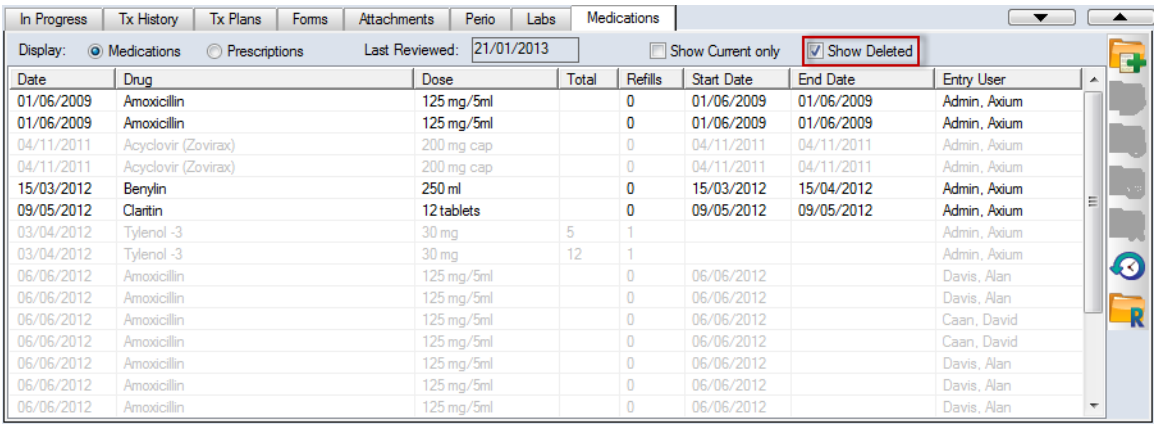
To view deleted medication records:

1. Go to the EHR window's Medications tab.

2. Select the Medications option.
   axiUm displays medication records in the list view.



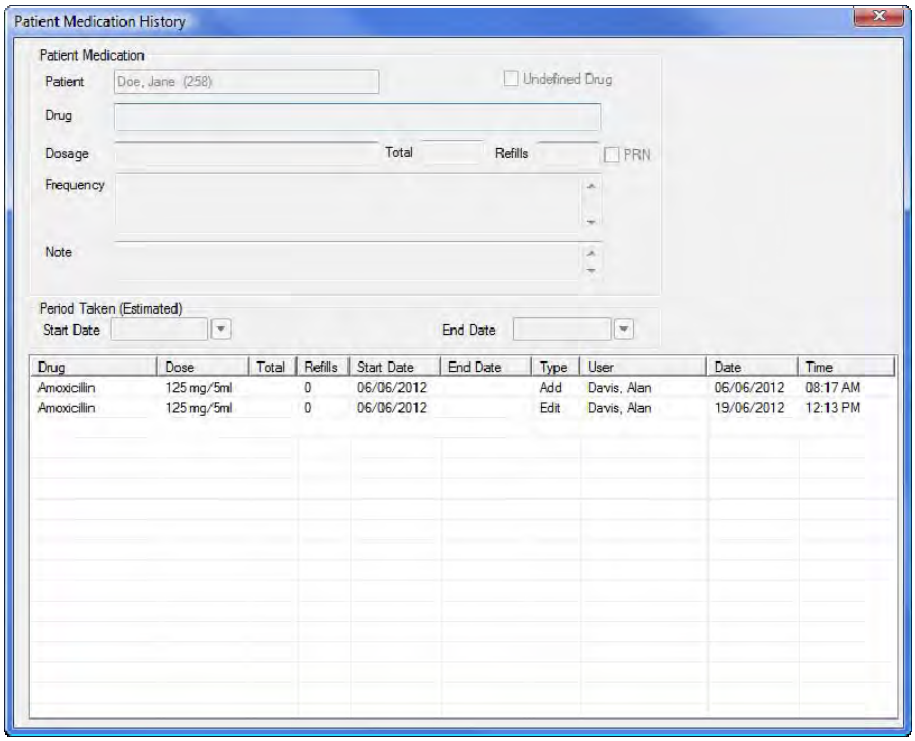
3. Select the Show Deleted checkbox (new).
   Note: This checkbox is enabled if the Show Current only checkbox is deselected.
   axiUm displays deleted records in gray text.



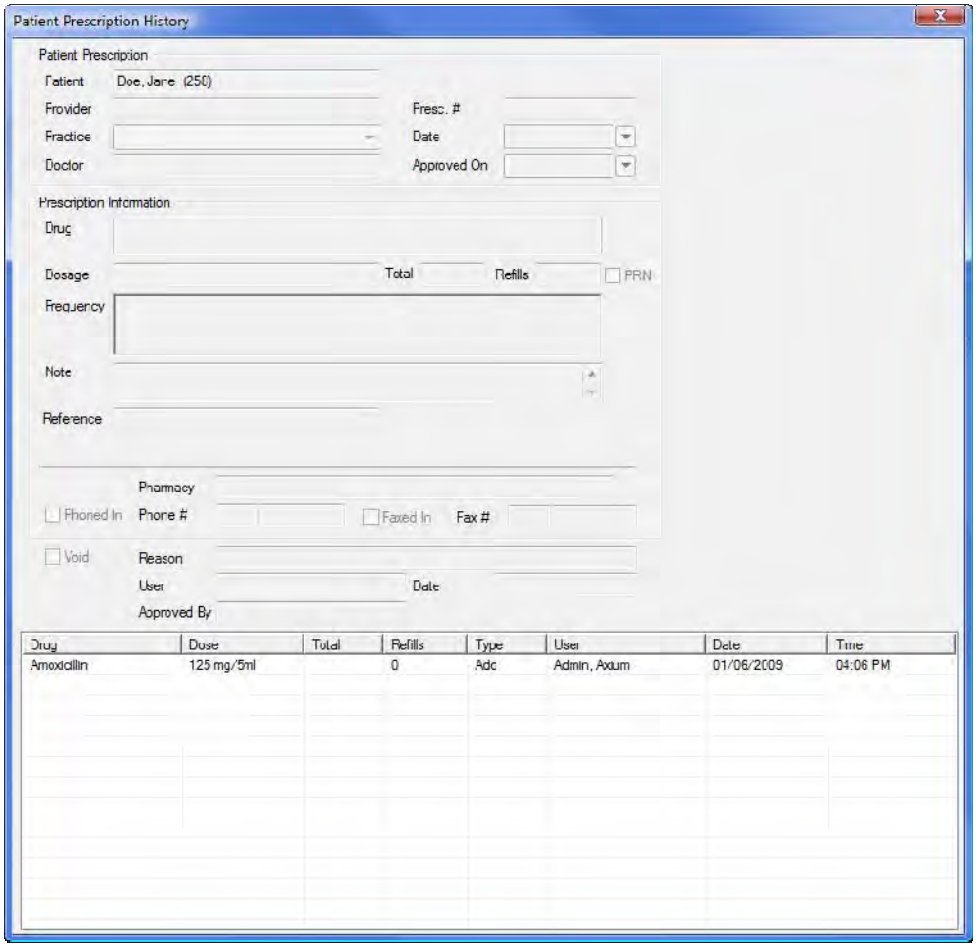
   You have successfully displayed deleted medication records in the Medications tab.

Enhancement 2:
axiUm has the following new history windows for auditing medication and prescription activities:

- Patient Medication History window (new)
  Go to EHR window – Medications tab – Medications option – select record from list view - (Show History) (new).



- Patient Prescription History window (new)
  Go to EHR window – Medications tab – Prescriptions option – highlight record from list view - (Show History) (new)



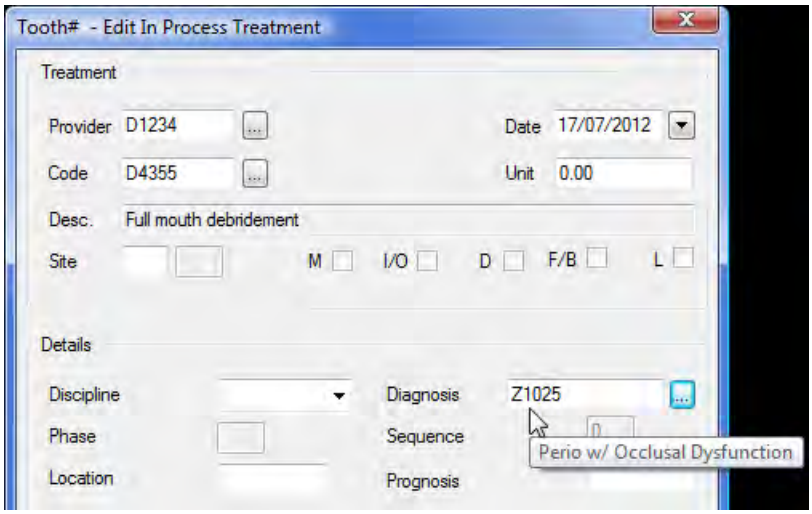
128749 – Ability to display full diagnosis description

Module: EHR – Tx History tab

Issue: When you create a diagnosis code, the Clinical Diagnosis Code window's Description field lets you enter a maximum of 60 characters but the EHR window's Tx History tab lets you see only 15 characters. Need the ability to display the full diagnosis description.

Enhancement: Now the Diagnosis column displays up to 50 characters depending on other settings.

Note: Only 5% of diagnosis descriptions in the COHRI list of standard diagnosis codes are longer than 50 characters. To view the entire description, double-click on a record to display the edit window (e.g. Edit In Process Treatment window) and hover over the Diagnosis field to display the tooltip.



To optimize the size of the Diagnosis column:

- Limit the display of optional columns (by going to the EHR window - (Options/Settings) - EHR Options window - Tx History tab - Hide Columns list box, and selecting columns to hide)
- Maximize the EHR window (by clicking (Maximize))
- Increase the resolution (by going to Maintenance window - System tab - Desktop icon - Desktop Options window - Display Settings section - Default Resolution drop-down field, and selecting a higher resolution)
- Enter diagnosis descriptions using title caps or lower case (using all upper case occupies more space)

128792 - Ability to define specific conditions on a consent form

Module: EHR - Chart Add tab

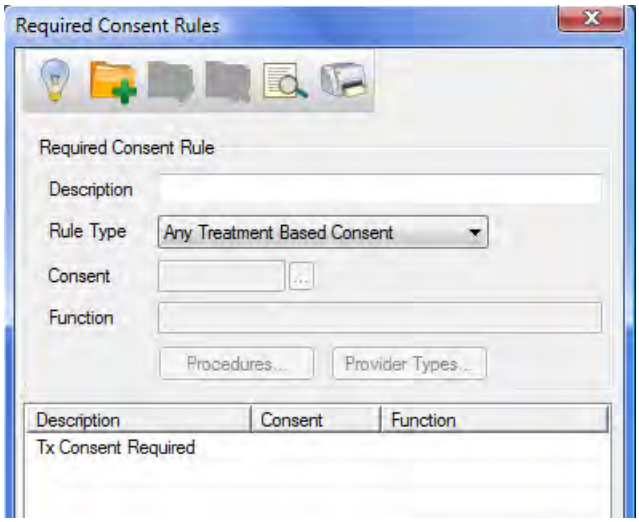
Issue: Currently, you can define a procedure to require a patient consent. Need the added ability to define specific circumstances requiring a patient consent.

Enhancement: Now you can define consent rules, and these rules are based on specific circumstances.

Setup;

1. Go to Maintenance window - EHR tab.
   There is a Required Consent Rules icon (new).

2. Click on the Required Consent Rules icon (new).
   axiUm displays the Required Consent Rules window (new).



Use this window to define consent form rules.

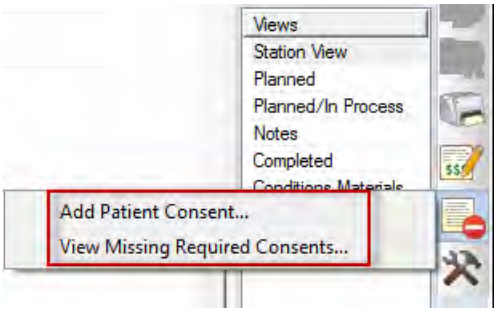
The consent rule titled Tx Consent Required is already provided for you. Use this consent rule to maintain the currently existing behavior; this rule requires *any* treatment-based consent form for *all* procedure codes that have been set up to require consent. You can change this consent rule.

You can create additional rules using the three options in the Rule Type drop-down field:

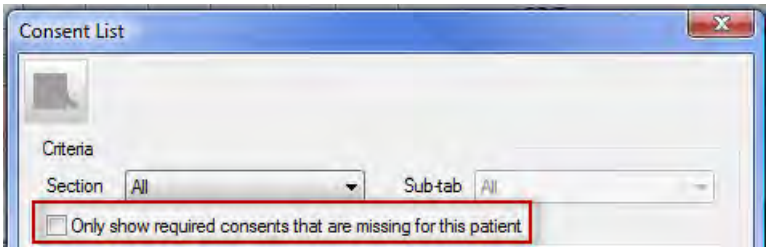
- **Any Treatment Based Consent**: Selecting this option indicates that *specific* provider types performing *specific* procedures require *any* treatment-based consent form.
- **Specific Consent**: Selecting this option indicates that *specific* provider types performing *specific* procedures require a *specific* consent form.
- **Custom Function**: Selecting this option indicates that specific patients (e.g. under 16 years old, has insurance, etc.) require a specific consent form. These rules are defined in custom functions.

The process of adding consents has been improved to help the user identify which consents are required and which treatments require the same consent:

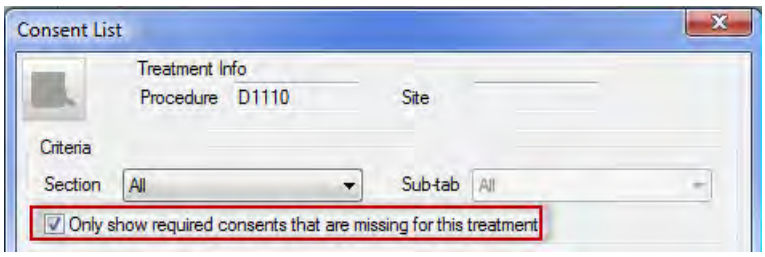
- In the EHR window, clicking  (Add Patient Consent) now displays two options:
  - Add Patient Consent (new): This option, if selected, displays the Consent List window. This is the same behavior as clicking  (Add Patient Consent) in previous versions.
  - View Missing Required Consents option (new): This option, if selected, displays the Consent List window showing only those consents required for the patient or the selected treatment.



- The Consent List window now has an **Only show required consents that are missing for this patient** checkbox, and selecting this checkbox displays only those consents that are required for the patient.



- The EHR window's Tx History tab now has a **View Missing Required Consents** right-click option (new). Selecting this option displays the Consent List window with the **Only show required consents that are missing for this treatment** checkbox (new) automatically displayed and selected.



Notes:

- You can now set up a planned treatment to require multiple consents to satisfy all rules. axiUm retains the consent indicator on the treatment record until you have satisfied all rules.
- If a provider belongs to a provider type that requires consent, the rule applies only if their user record indicates that they require a patient consent.
- Consents are only required for patients whose record indicates that a treatment-based consent is required.

128848 – New eRx printer controls

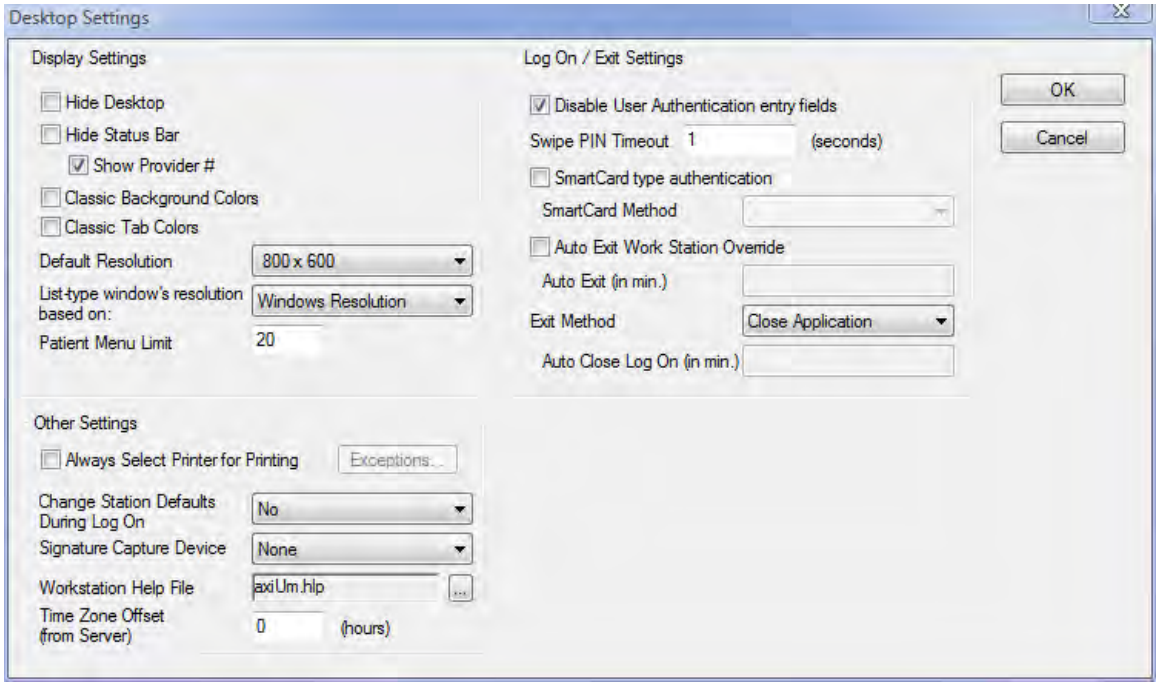
Module: EHR – Medications tab

Issue: Need the ability to select and configure the printer for eRx printing.

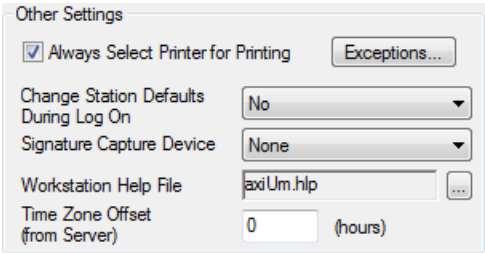
Enhancement: Now axiUm has the ability to display a printer prompt when you use eRx.

Default printer setup:

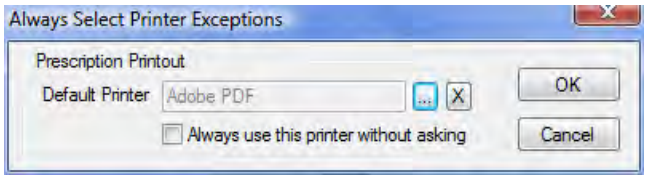
1. Open the Desktop Settings window.
   Go to Maintenance window – System tab – Desktop icon.



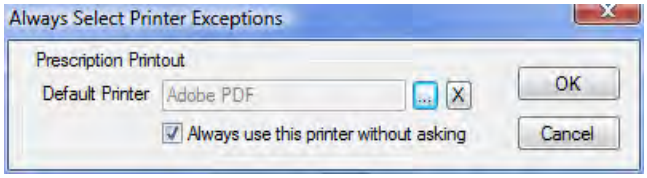
2. Go to the Other Settings section and select the Always Select Printer for Printing checkbox.
   axiUm enables the Exceptions button.



3. Click the Exceptions button.
   axiUm displays the Always Select Printer Exceptions window.



4. Select the **Always Use this printer without asking** checkbox.
   This forces axiUm to use the selected printer.



5. Click OK.

   axiUm saves the changes, closes the Always Select Printer Exceptions window, and returns to the Desktop Settings window.

6. Click OK.

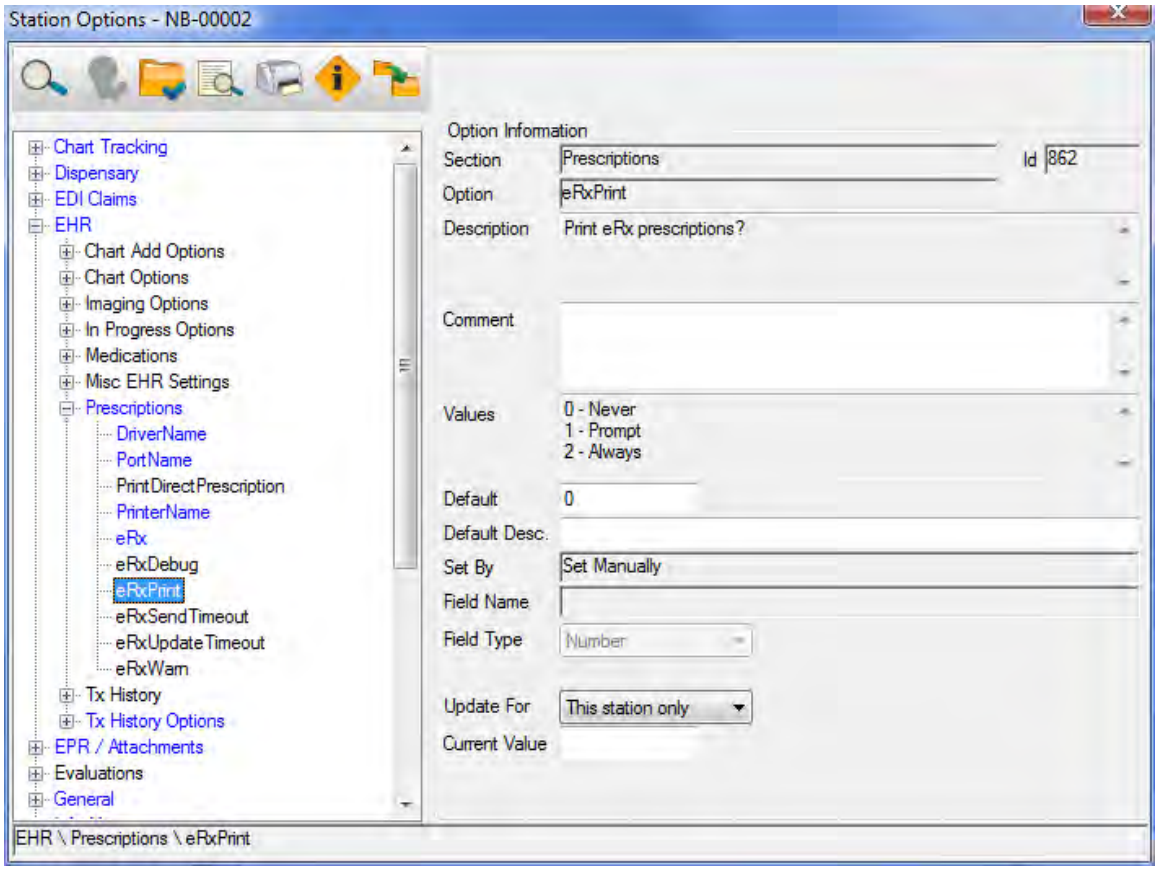
   axiUm closes the Desktop Settings window and returns to the Maintenance window.

Printer prompt setup:

1. Open the Station Options window.

   Go to the Maintenance module - System tab - Stations icon – Station Codes window - (Station Options).

2. Go to EHR section – Prescriptions section – eRxPrint item (new).



3. In the Current Value field, enter one of the following options:

- 0 – Never: When you close the eRx module, axiUm does not print the eRx prescription.
- 1 – Prompt: When you close the eRx module, axiUm displays the prompt, “New prescriptions have been entered into eRx. Do you wish to print these prescriptions?” Clicking the Yes button prints the prescription to the default printer selected in the previous setup.
- 2 – Always: When you close the eRx module, axiUm automatically prints the prescription to the default printer selected in the previous setup.

129403 - Improved support of appointments

Module: EHR – Tx History tab

Issue: When you are in the Tx History tab, need the ability to:

- Delete an appointment record or a recall record.
- Visually identify treatment records containing multiple appointments, and have axiUm display a warning when you delete these records.
- Display more information on appointment records.

Enhancement: The following enhancements have been made:

- You can delete all appointment-type records and recall records. When you delete these records, axiUm displays the EHR Delete Appointment Warning window (new).

- When a treatment record contains multiple appointments, axiUm displays overlapping icons in the Date column. When you delete this treatment record, axiUm displays a new warning to indicate that there are multiple appointments tied to this treatment. Note that axiUm does not display this warning if the original appointment is deleted, cancelled, failed, or checked out.

- The appointment record’s Description column displays appointment code, and the Discipline column displays the discipline name. The recall record’s Description column displays the recall comment and clinic name.

129508 – Ability to default Medications or Prescriptions option

Module: EHR – Medications tab

Issue: Need the ability to default the Medications tab to select the Medications option or the Prescriptions option.

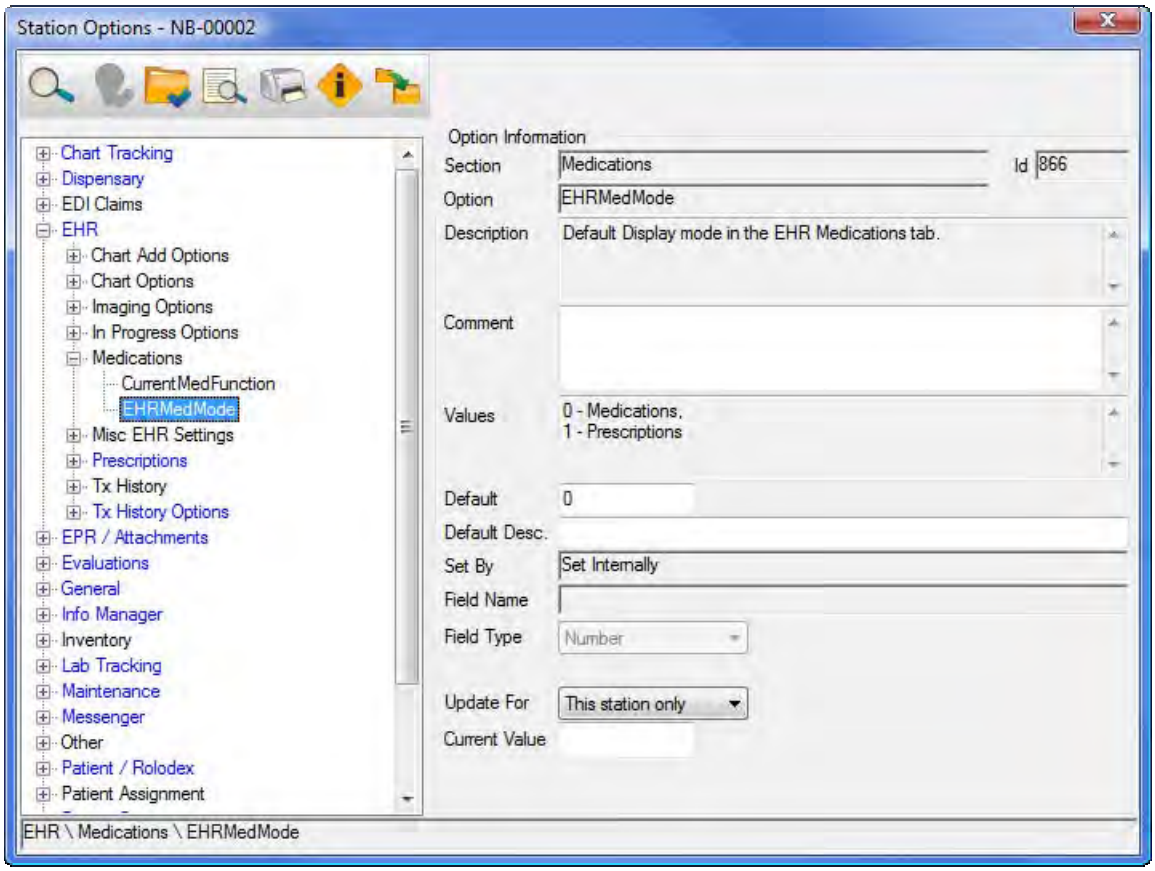
Enhancement: Now has the ability to default the Medications tab to select the Medications option or the Prescriptions option.

Setup:

1. Open the Station Options window.

   Go to the Maintenance module - System tab - Stations icon – Station Codes window - (Station Options).

2. Go to EHR section - Medications section – EHRMedMode(new).



3. In the Current Value field, enter one of the following options:

   - 0 – Medications: Selects the Medications option by default.
   - 1 – Prescriptions: Selects the Prescriptions option by default.

129707 – Improved warning window

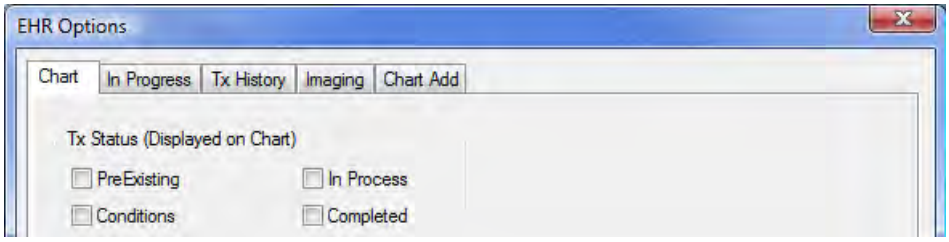
Module: EHR ~ Services Not Covered Warning window

Issue: Currently, when you create a *planned* treatment that is not covered by insurance, axiUm can display the Services Not Covered Warning window, and this is useful to know at the time you create the planned treatment. However, if you create an in-process treatment or a completed treatment, axiUm does not display the same message and you are unaware that the treatment is not covered. Need the ability to display this window when you create in-process treatment records and completed treatment records.

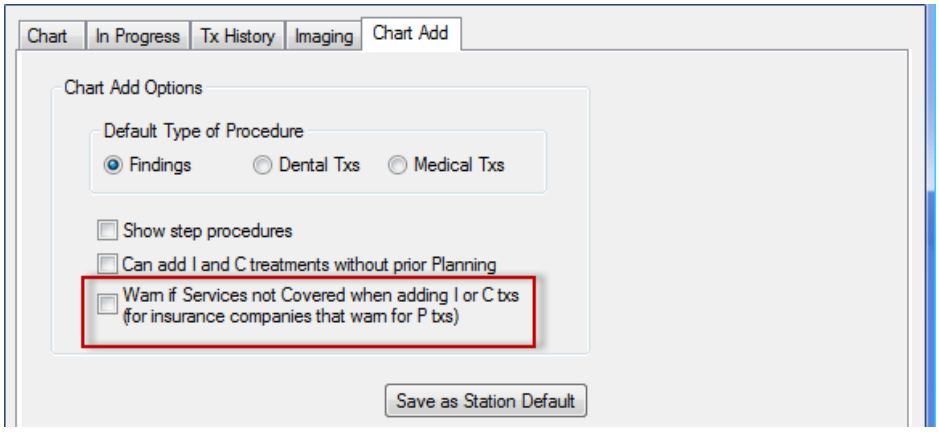
Enhancement: Now axiUm has the ability to display this window when you add in-process treatment records and completed treatment records.

Setup:

1. Open the EHR Options window.



2. Click the Chart Add tab.



3. Select the **Warn if Services not Covered when adding I or C txs (for insurance companies that warn for P txs)** checkbox.

4. Click the OK button.

   axiUm saves the changes, closes the EHR Options window, and returns to the EHR window.

Then when you enter an in-process or completed treatment record, and the patient's primary insurance company does not cover this treatment, axiUm displays the Services Not Covered Warning window.

In addition to this, axiUm checks the patient's coverage templates (eligible amount and coverage percentage), limits (patient, family, item, and category), and frequency (item and category), and then indicates on the Services Not Covered Warning window why the service is not covered. axiUm displays this additional information in all cases.

This enhancement also applies to the Ortho module and the Perio module.

130137 - Improved Treatment Planning module

Module: EHR - Tx Plan tab

Issue: The current Treatment Planning module requires a long an involved process to create treatment plans. Need to improve the usability of this module.

Enhancement: Improve the usability of this module by changing the interface of the Treatment Planning module. For more information, refer to the Treatment Planning Module document on the axiUm portal.

130733 – Ability to multi-select tooth condition records & resolve them

Module: EHR – Tx History tab

Issue: Currently, you can resolve one condition at a time. Need the ability to resolve multiple condition records.

Enhancement: Now you can select multiple records from the list view and select the Resolve Condition right-click option.

You can also do this in the following windows:

- Tooth Notes/Conditions window
  In EHR window – odontogram – select tooth – right-click – Tooth Notes/Conditions

- Tooth Conditions window
  In EHR window – odontogram – select tooth – right-click – Tooth Notes/Conditions – Tooth Notes/Condition window - (Add a new Condition)

133016 – Review of current medications

Module: EHR – Medications tab

Issue: Need the ability to confirm that a patient's current medication list has been reviewed.

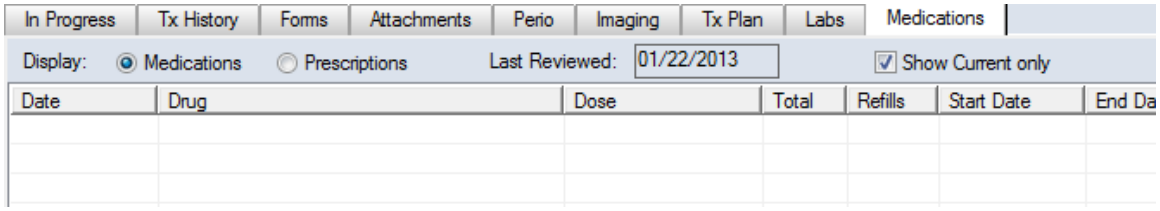
Enhancement: Now has the ability to confirm that a patient's current medication list has been reviewed.

The following examples show two scenarios:

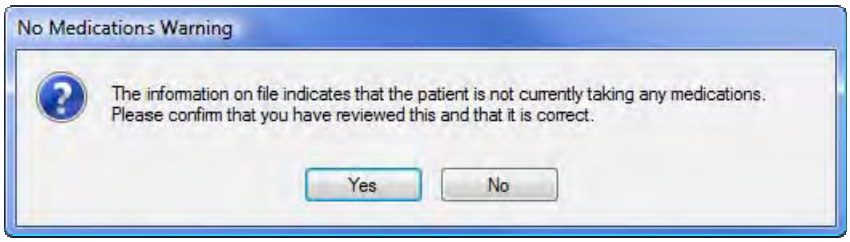
- The patient has no current medication on record.
- The patient has existing medication on record.

To confirm that a patient has no current medication on record:

1. Go to the EHR window's Medications tab.
   Note that the patient has no current medication on record.



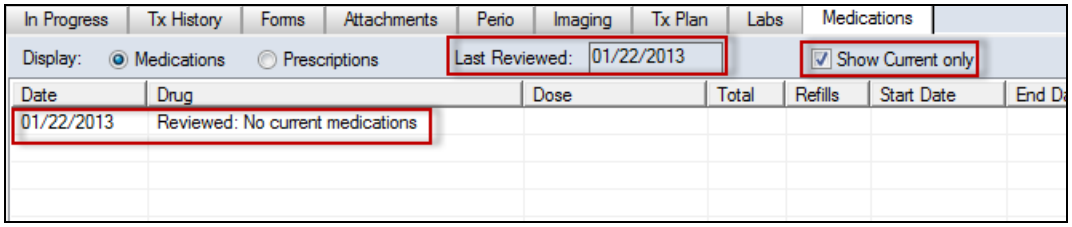
2. Click (Review Medications) (new).
   axiUm displays the No Medications Warning window (new).



   Yes: Clicking this button confirms that you have reviewed the patient's current medications.

   No: Clicking this button cancels the confirmation process.

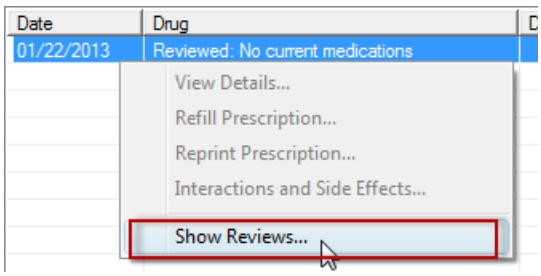
3. Click the Yes button.
   axiUm saves your confirmation, closes the No Medications Warning window, and returns to the EHR window's Medications tab.



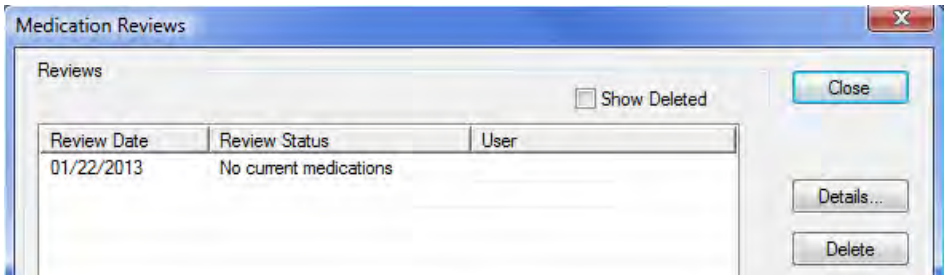
   The Last Reviewed static field (new) displays the confirmation date.

   Selecting the Show Current only checkbox shows current medications only, and since there are none, axiUm displays a record stating "Reviewed: No current medications".

4. Highlight this record and select the Show Reviews right-click option (new).



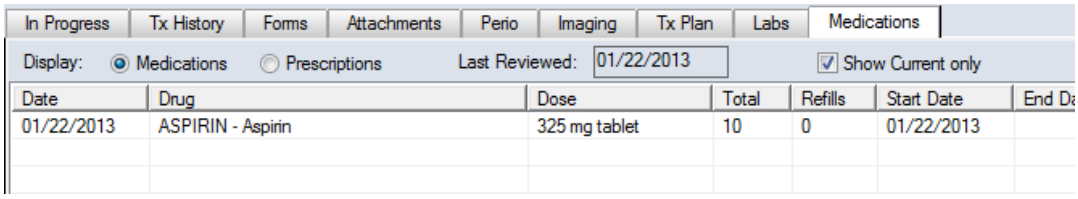
   axiUm displays the Medication Reviews window (new).



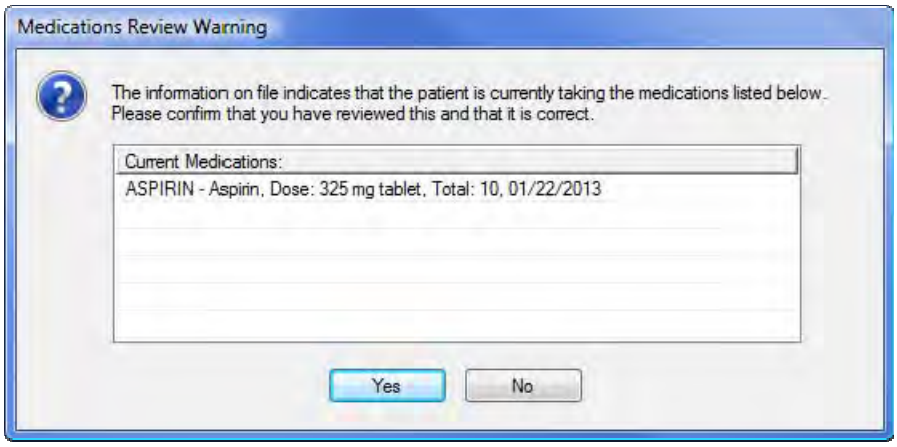
For information on the Medication Reviews window, see “Medication Reviews window” at the end of this enhancement.

To confirm that a patient has existing medication on record:

1. Go to the EHR window’s Medications tab.
   Note that the patient has current medication existing on record.



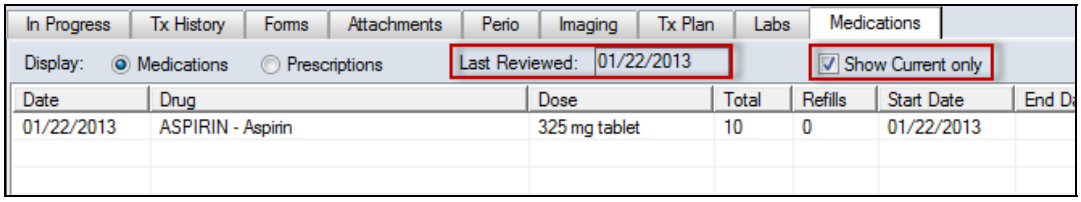
2. Click  (Review Medications) (new).
   axiUm displays the Medications Review Warning window (new).



Yes: Clicking this button confirms that you have reviewed the patient’s current medications.

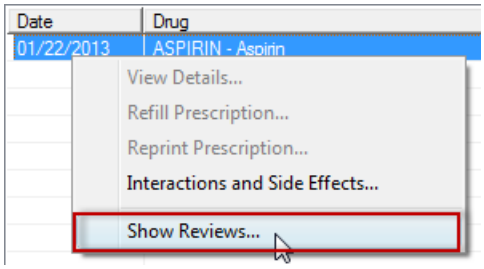
No: Clicking this button cancels the confirmation process.

3. Click the Yes button.
   axiUm saves your confirmation, closes the Medications Review Warning window, and returns to the EHR window’s Medications tab.

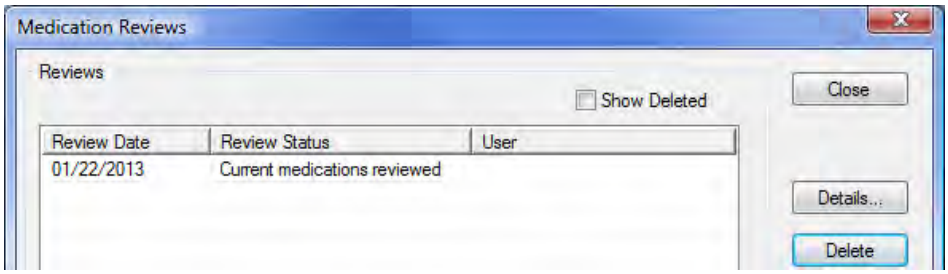


The Last Reviewed static field (new) displays the confirmation date.

4. Highlight this record and select the Show Reviews right-click option (new).



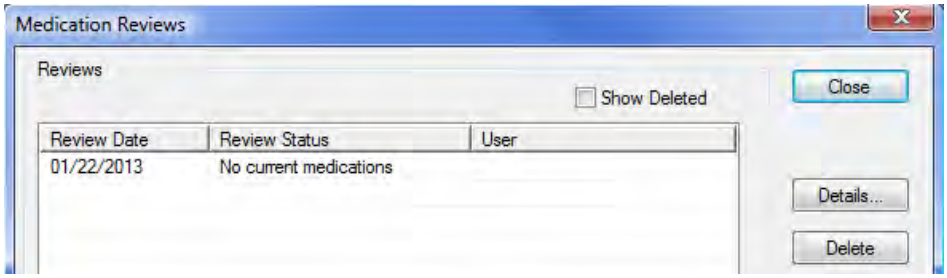
axiUm displays the Medication Reviews window (new).



For information on the Medication Reviews window, see the next section, “Medication Reviews Window”.

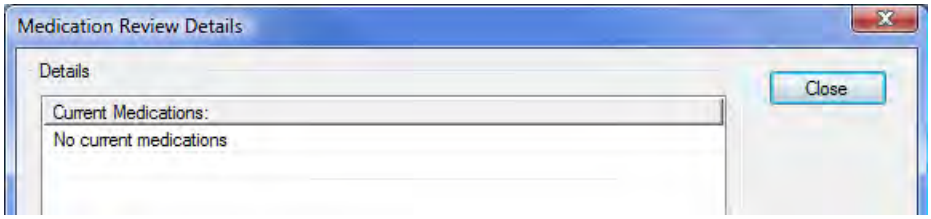
Medication Reviews Window

Use this window to view a historic list of confirmations for the selected patient medication.



Close: Clicking this button closes the Medication Reviews window.

Details: Clicking this button displays the Medication Review Details window (new).



Use this window to view the details of the selected confirmation record.

Delete: Clicking this button deletes the record highlighted in the list view.

Important Note:

You can also confirm a patient's current medication using eRx and this confirmation can be imported into axiUm. Conversely, performing a confirmation using axiUm (like in the examples shown here) *cannot* be imported into eRx. Hence, if you use eRx, you must disable (Review Medications) in the PowerAdmin module and force all users to use only eRx for confirming patient medications.

134538 – Can default to show only current medications

Module: EHR – Medications tab

Issue: When you go to the EHR window's Medications tab, axiUm displays all medications for the selected patient. Then if you want to see only their current medications, you must select the **Show Current only** checkbox. Need the ability for axiUm to select this checkbox by default.

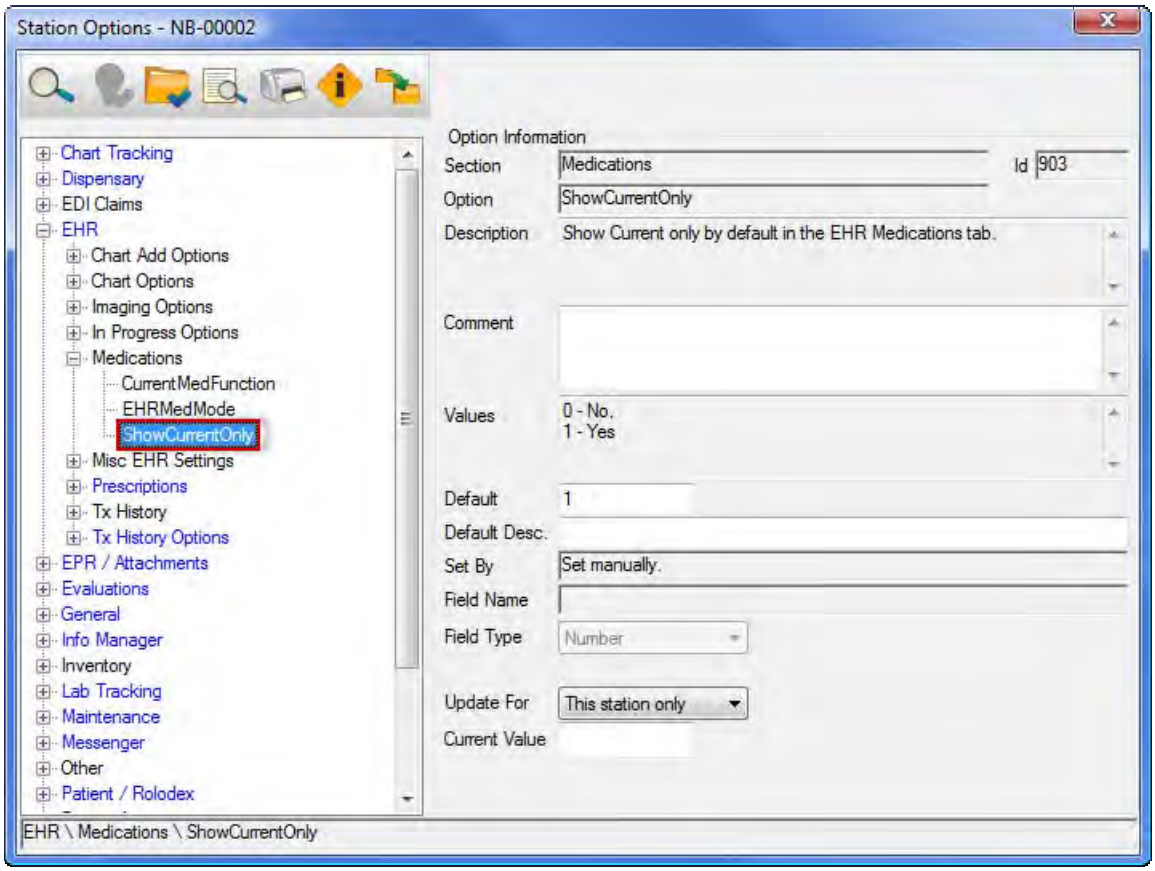
Enhancement: Now axiUm has the ability to select the **Show Current only** checkbox by default.

Setup:

1. Open the Station Options window.

   Go to the Maintenance module - System tab - Stations icon – Station Codes window - (Station Options).

2. Go to EHR section – Medications section – ShowCurrentOnly item (new).



0 - No: Show all medications.
1 - Yes: Show only current medications.

3. In the Current Value field, enter 1.

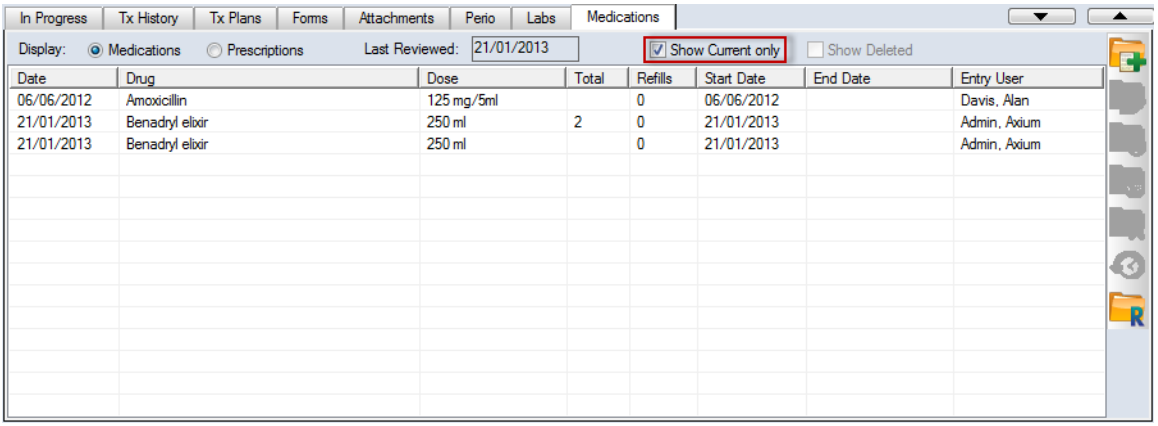
4. Click (close).
   axiUm closes the Station Options window and returns to the Station Codes window.

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

Usage:

1. Go to the EHR window's Medications tab.

2. Select the Medications option.
   axiUm displays only medication records in the list view.

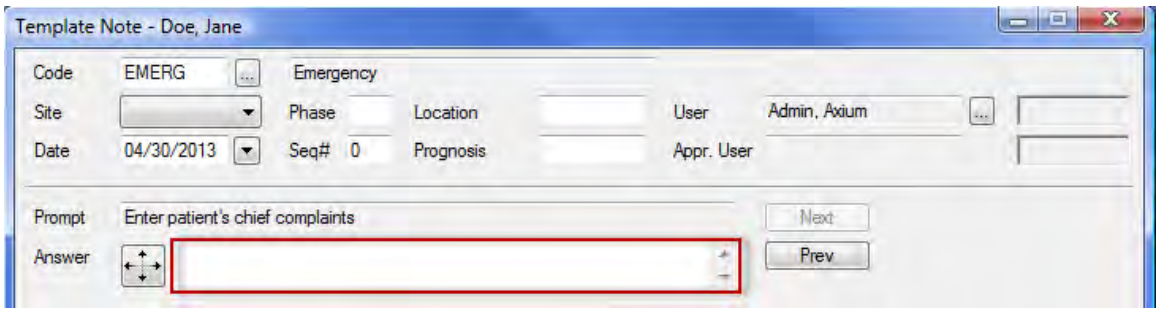


The **Show Current only** checkbox is selected by default.

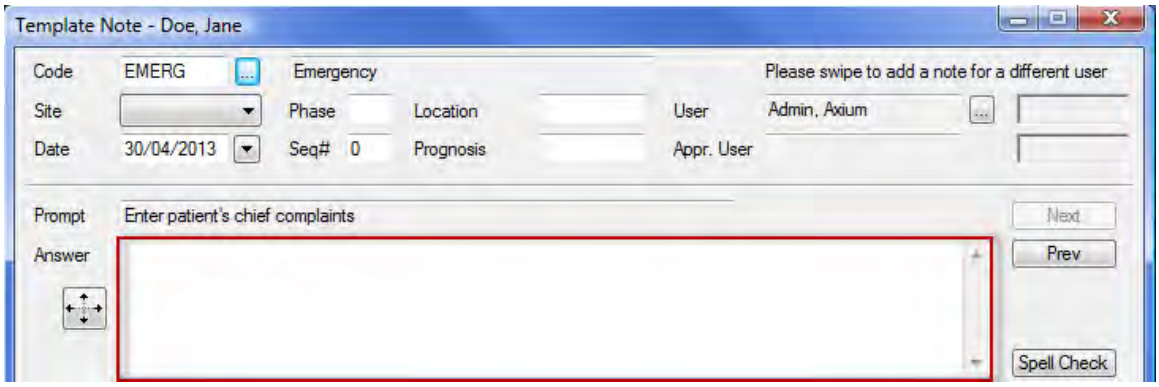
134767 – Template note's long text answer field is larger

Module: EHR ~ Template Note window

Issue: The Answer text box (for entering long text answers) is often too small and you must click (expand) to see everything you are entering. Need this text box to be larger.



Enhancement: Now the Answer text box is larger.



134893 – Ability to access axiUm while eRx is running

Module: EHR – Medications tab

Issue: Need the ability to access axiUm while DrFirst™ Rcopia® is running the eRx module. Currently you must close the eRx module before returning to axiUm to continue performing other tasks.

Enhancement: Now you can leave the eRx module running and continue working in axiUm. During this time, if you change a patient's prescription information in axiUm or the eRx module, you must go to the EHR window's Medications tab and click (Refresh eRx) to synchronize the two applications.

Note: If you close the eRx module, axiUm still prints prescriptions (existing behavior). However, if you leave the eRx module open and want to print the eRx prescription, click (Refresh eRx). Prescription print options are set in Station Options window – EHR section– Prescriptions section – eRxPrint item.

If eRx is running and you:

- Select a different patient and return to eRx module, axiUm synchronizes the previous patient, and then the currently selected patient.
- Switch user, log on as a different user, or log off, axiUm synchronizes and then closes the eRx module.

134899 – Ability to prevent double-clicking from opening tooth window

Module: EHR ~ Odontogram (Tooth View Mode) window

Issue: When selecting a tooth number on the odontogram many users accidentally double-click (rather than single-click). This displays the Odontogram (Tooth View Mode) window. Need the ability to prevent this.

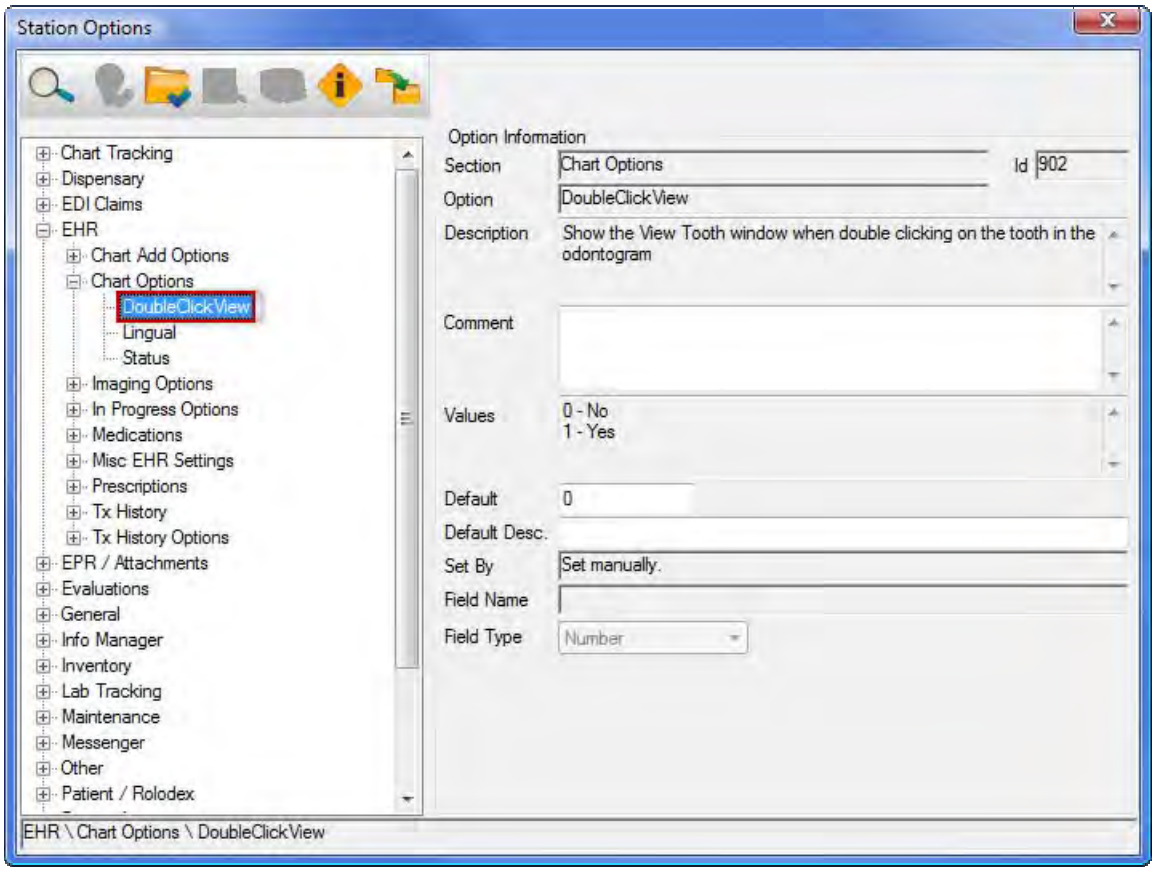
Enhancement: Now axiUm has the ability to prevent the Odontogram (Tooth View Mode) window from displaying when you double-click a tooth number on the odontogram.

Setup:

1. Open the Station Options window.

   Go to Maintenance window – System tab – Stations icon - Station Codes window - (Station Options) – Station Options window:

2. Go to EHR section – Chart Options section – DoubleClickView item (new).



- 0 - No: Double-clicking a tooth number on the odontogram does nothing
- 1 - Yes: Double-clicking a tooth number on the odontogram displays the Odontogram (Tooth View Mode).

135371, 136139 - New Spell Check button in windows

Module: EHR ~ General Note window, Template Note window, SOAP Note window, Add Ortho Visit / Ortho Treatment window

Issue: Currently only the ScratchPad window has a spellchecking tool. Need the same functionality in note windows:

- General Note
- General Note (Treatment)
- SOAP Note
- Template Note (Long Text field only)
- Template Note (Treatment) (Long Text field only)
- Add Ortho Visit / Ortho Treatment
- Edit Planned Ortho Treatment
- Edit In Process Ortho Treatment
- Edit Completed Ortho Treatment
- Approve Note
- New Message
- Reply to Message
- Forward Message

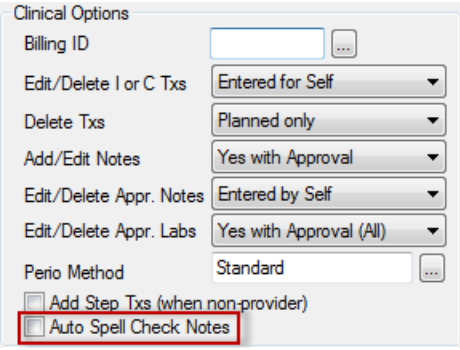
Enhancement: There is new spellchecking ability in all note windows. If a user would like to set up spell checking to happen automatically when the press OK on all note windows, they can set this in the Maintenance Users record or via the Tools menu.

A standard medical dictionary is available, which can be customized. The spell check dialog is in PowerAdmin, so the usage can be controlled by user level. Other dictionaries can also be made available.

Setup:

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

2. Click the Clinical tab and go to the Clinical Options section.



3. Select the Auto Spell Check Notes checkbox (new).
   Selecting this checkbox indicates that this user automatically uses spellcheck on any text with spell checking capabilities.

   Note: For users who do not have auto-spellcheck activated, or you do and want to turn it off, you can go to Tools menu – User Preferences option – Auto Spell Check Clinical Notes option. For users who have auto spellcheck enabled, this will already be selected. Selecting this tool indicates to run spell checker on OK on note windows (e.g. clinical notes), where this feature exists, and this applies to this user only.

4. Click the Save button.

5. Click the Close button.

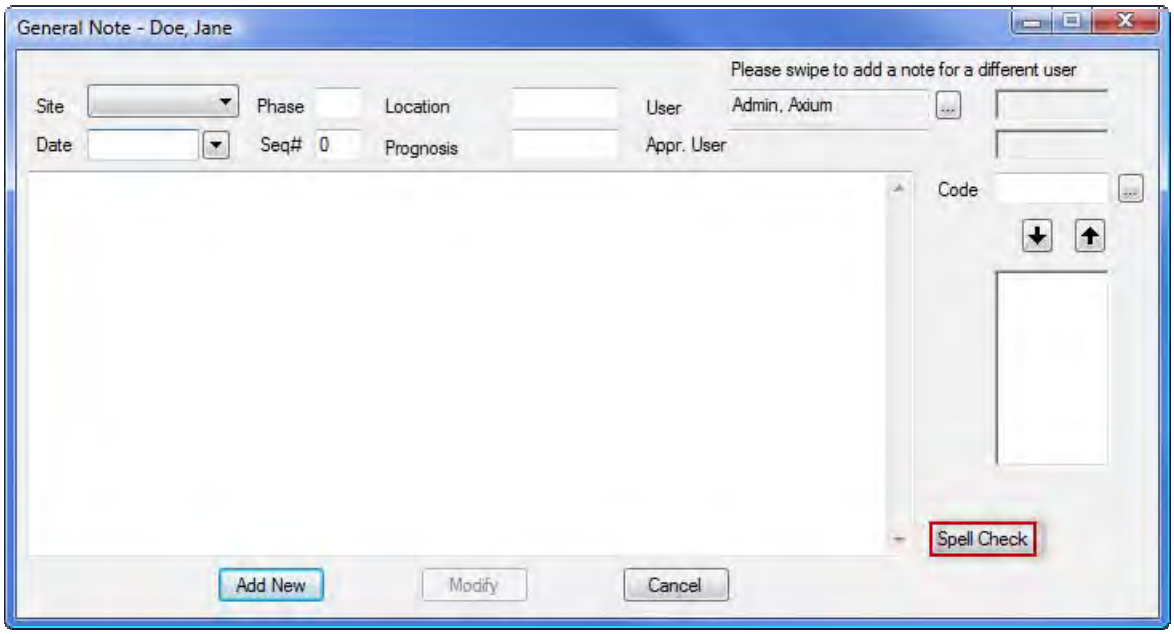
Now there is a Spell Check button in the following windows:

- General Note
- General Note (Treatment)
- SOAP Note
- SOAP Note (Treatment)
- Template Note (Text field and Long Text field only)

- Template Note (Treatment) (Text field and Long Text field only)
- Add Ortho Visit / Ortho Treatment
- Edit Planned Ortho Treatment
- Edit In Process Ortho Treatment
- Edit Completed Ortho Treatment
- Approve Note
- New Message
- Reply to Message
- Forward Message

The example below shows the General Note window:

Go to EHR window – Tx History tab – (Add a new Note) – Select Note Type window – General Note option – OK button



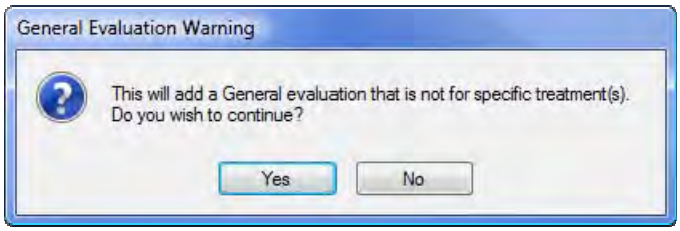
Evaluations

120975 – Ability to block adding any evaluations with no treatment

Module: Evaluations – Evaluations tab, Grades tab

Issue: When you go to the Evaluations window's Evaluations tab or the Grades tab, and you click the Add button and add an evaluation with no treatment associated to it, you must later search for the matching treatment and re-enter the evaluation. Need the ability to stop users from entering evaluations with no associated treatments.

Enhancement: Now in the above scenario, clicking the Add button displays the General Evaluation Warning window (new). To prevent the user from continuing, go to the PowerAdmin module and disable the Yes button.



General

56152 – Now supports Interlink ePads

Module: Signature

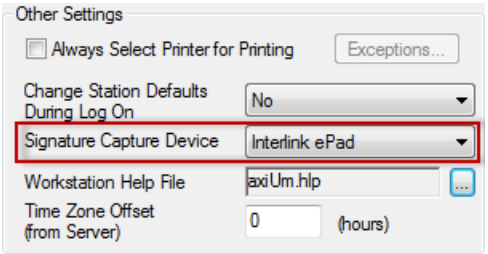
Issue: Need axiUm to support Interlink ePads.

Enhancement: Now axiUm supports ePads for capturing patient signatures (e.g. consents and contracts).

Setup for axiUm:

1. Open the Desktop Setting window.
   Go to Maintenance window – System tab – Desktop icon.

2. Go to the Other Settings section.



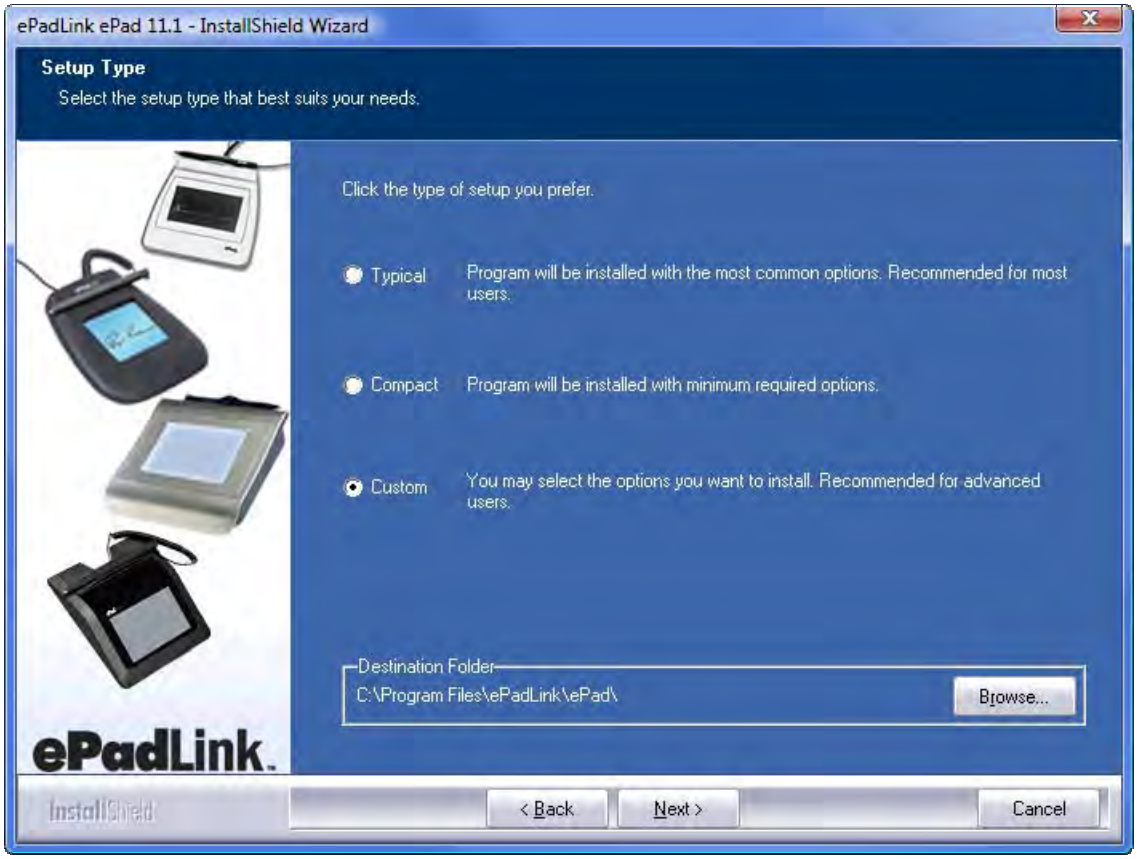
3. From the Signature Capture Device drop-down field, select the Interlink ePad option (new).

4. Click the OK button.
   axiUm saves the changes, closes the Desktop Settings window, and returns to the Maintenance window.

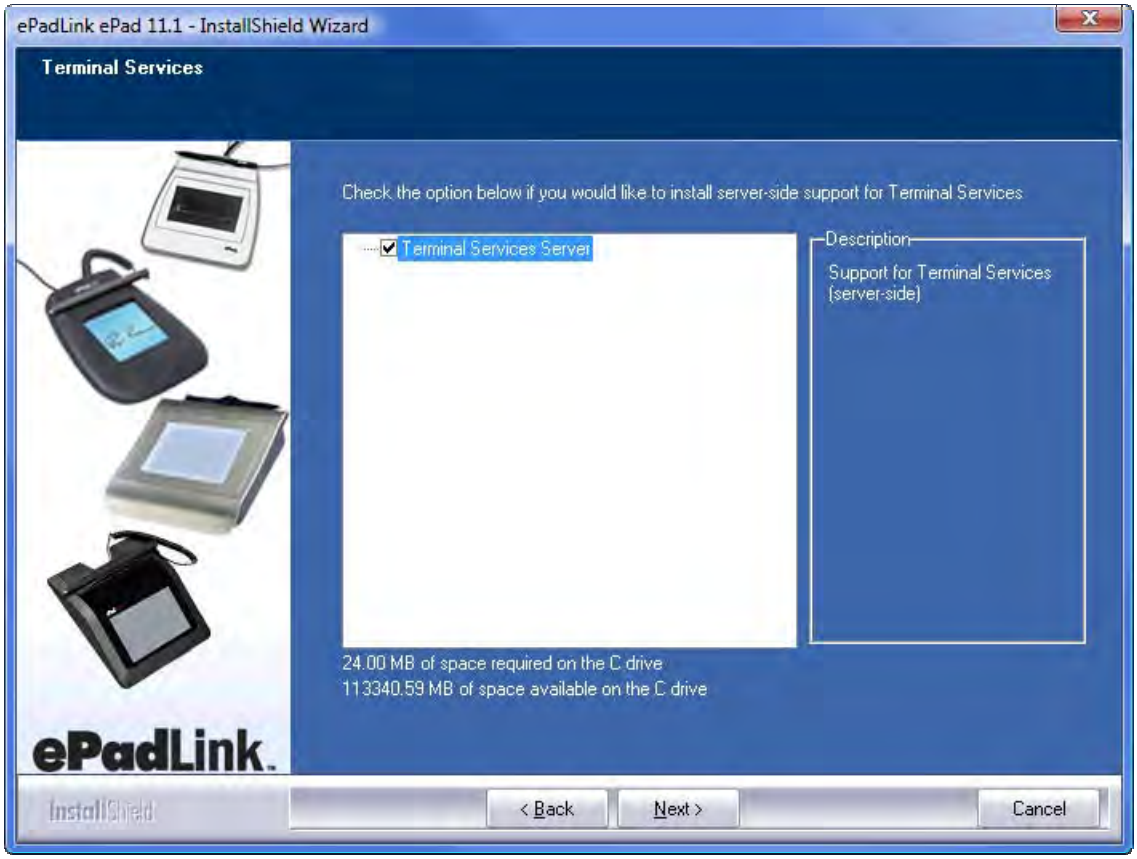
Setup for client machine/single user:

1. Install Universal Installer 11.1 from http://www.epadsupport.com/

   Note: When selecting setup type, select the Custom option.



When you select the Custom option, you have the ability to select the Terminal Services checkbox later in the install process.



2. Open http://www.epadsupport.com/?q=node/17

    - For 64 bit operating systems, install UI11.0R11564_client_x64_setup.exe (64 bit version) and I11.0R11563_client_setup.exe (32 bit version).

    - For 32 bit operating systems, install UI11.0R11563_client_setup.exe.

Setup for server (for Citrix environment):

Install Universal Installer 11.1 from http://www.epadsupport.com/

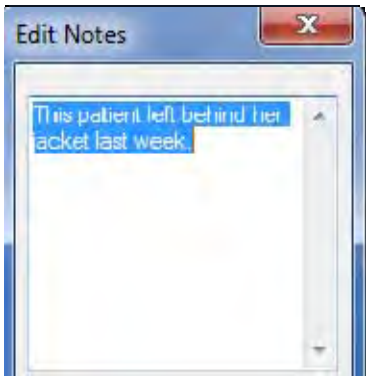
66512 – Sticky Notes – Text Highlighted

Module: Sticky Notes

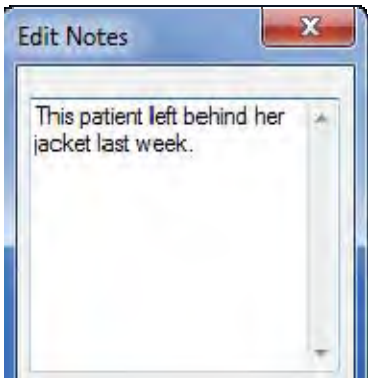
Issue: Text is automatically highlighted in the Edit Notes window, which makes it difficult to read when initially opening the window to read the note. Furthermore, with the text highlighted it is really easy to mistakenly clear the entire note by pressing any key on the keyboard.

Enhancement: Text is no longer highlighted in the Edit Notes window when the window is opened.

Current:



New:



97667 – Increased signature area

Module: Signature

Issue: In some cases (e.g. when using iPads), the signature area is too small. Need to increase this space.

Enhancement: Now when you go to Maintenance window – System tab – Desktop icon – Desktop Setting window – Other Settings section, and in the Signature Capture Device drop-down field you select the None option, the signature capture area is the same size as those used in Topaz signature pads.

101315 – Ability to update database check utility

Module: Database

Issue: Currently, the database check utility (for troubleshooting potential database problems), is valid only if you are using Engine 3 (OO4O). As you update engines, you will also need the ability update the database check utility.

Enhancement: Now when you run axiumdbCheck.exe, you can select your current Database Engine version. In the File > Database Connection window, there is a DB Engine field (new) for entering one of the following valid entries:

- 3= OO4O
- 4= SQLAPI
- 5= OCCI

Then when you run the Check Database utility, it performs the check for the correct DB Engine.

117890 – Default "Keep currently selected patient" option

Module: Switch User/Log On As User

Issue: When a user selects 'Switch User' or 'Log On As User' from the Tools menu, they would like to be able to keep the current patient by default rather than having to select the 'Keep currently selected patient' check box every time.

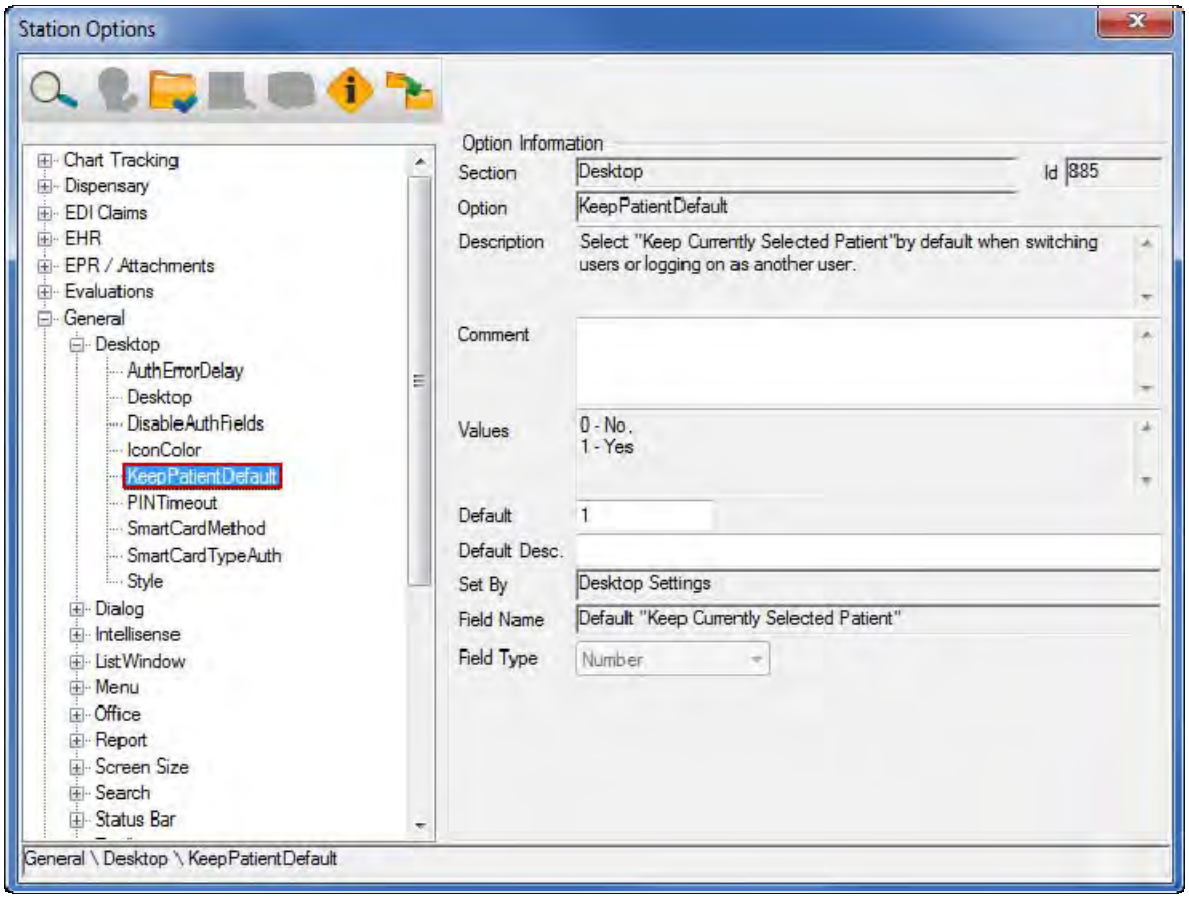
Enhancement: Now axiUm has the ability to select the **Keep currently selected patient** check box by default.

Setup:

1. Open the Station Options window.

   Go to the Maintenance window – System tab – Station Options icon.

2. Go to the General section – Desktop section – KeepPatientDefault item (new).



3. In the Default field, enter one of the following options:
   - 0 – No: Clears the “Keep currently selected patient” check box by default in the Switch User window and the Log.On window.
   - 1 – Yes: Selects the “Keep currently selected patient” check box by default in the Switch User window and the Log.On window.

126946 – Improved Topaz signature pad interface

Module: Signature

Issue: The Topaz sigpad interface runs as a separate program. This causes the following problems:

- If the sigpad application (tzsigpad.exe) crashes, axiUm may not fully recover it.
- Cannot avoid writing the signature to the hard drive as a bitmap while sending it from tzsigpad to axiUm.
- Signatures captured in Topaz have a margin of dead space around the signature.

Enhancement: Resolved the above issues.

Setup for client machine/single user (Topaz 1x5):

Go to http://www.sigpluspro.com/bsb/index.html and install drivers for Topaz 1x5 (T-LBK462-BSB-R) model.

Setup for server (Topaz 1x5):

1. RDP to Citrix server.
2. Open Command prompt as Administrator.
3. Enter Change port /query and press the Enter key.
   - AUX = \DosDevices\COM1
   - COM2 = \Device\Serial1
   - COM3 = \Device\RdpDrPort\;COM3:2\tsclient\COM3

     This ensures Com3 is the redirected port.
4. Download SigPlus.exe from http://www.sigpluspro.com/Software/sigplus.exe.
5. Run SigPlus.exe and when it asks for the port to use, select com3 (do not use USB).

   Note: If sigplusroot.ini exists, delete it.

Setup for Topaz 4X5:

For instructions, see http://www.topazsystems.com/Software/download/SigSock.pdf

132976 – Avoid crash when database connection is lost

Module: Database Engine

Issue: If axiUm loses its database connection (e.g. you remain logged onto axiUm overnight and the database is taken down for running nightly backups, or your network connection is interrupted), axiUm displays an SQL error message and appears to crash. This crash is falsely logged in the event table as an axiUm crash.

Enhancement: Several changes have been made.

Now in the above scenario:

1. axiUm displays the Database Error window with the message, “Connection to the Oracle Server is no longer present. The application will be closed.”

   This is more helpful than the standard SQL error message that axiUm previously displayed.

2. Click OK to close the Database Error window.
   axiUm closes all windows and logs out properly (instead of crashing).
3. axiUm logs this incident in the event log as a database problem (not a crash), under EventType="DATABASE ERROR".
4. axiUm displays the Log On window for you to log back on.

133153 – New log files for crash/hang & database error

Module: Error Messages

Issue: In the event of a crash, hang, or database error, need axiUm to record this information.

Enhancement: Now if you are running axiUm on Windows Vista or newer, axiUm has the ability to create a log file containing the following information:

- Type:
  - Crash or Hang
  - Database Error
- Patient ID
- Dialog ID and title (if applicable)

You must set up axiUm to enable logging in Maintenance window – System tab – Stations icon – Station Codes window - (Station Options) – Station Options window - General section – Office section – DBLogging item (new):

- 0 - No
- 1 – DB error only
- 2 - DB error and log on/off

You must also define the location of the log file in Maintenance window – System tab – Stations icon – Station Codes window - (Station Options) – Station Options window - General section – Office section – DBLocalLogPath item (new). In the Current Value text box, enter a folder location for axiUm to save the log file (e.g. c:\logfiles). Make sure this folder exists and that the station has write access to it. axiUm creates the log file in this folder using the file-naming format computername.txt. For example, if your computer is called Workstation1234, axiUm saves the log file as c:\logfiles\Workstation1234.txt.

Note: In the event of a crash/hang or database error, axiUm can send you Messenger events or display indicators on the status bar. These are custom support features. For more information about these custom support features, contact axiUm Technical Support.

133156 – Option to automatically restart axiUm after unexpected error closes the system

Module: Startup

Issue: When axiUm closes unexpectedly, users must restart axiUm manually.

Enhancement: There is now a station option that enables users to restart axiUm automatically after an unexpected error closed the system.

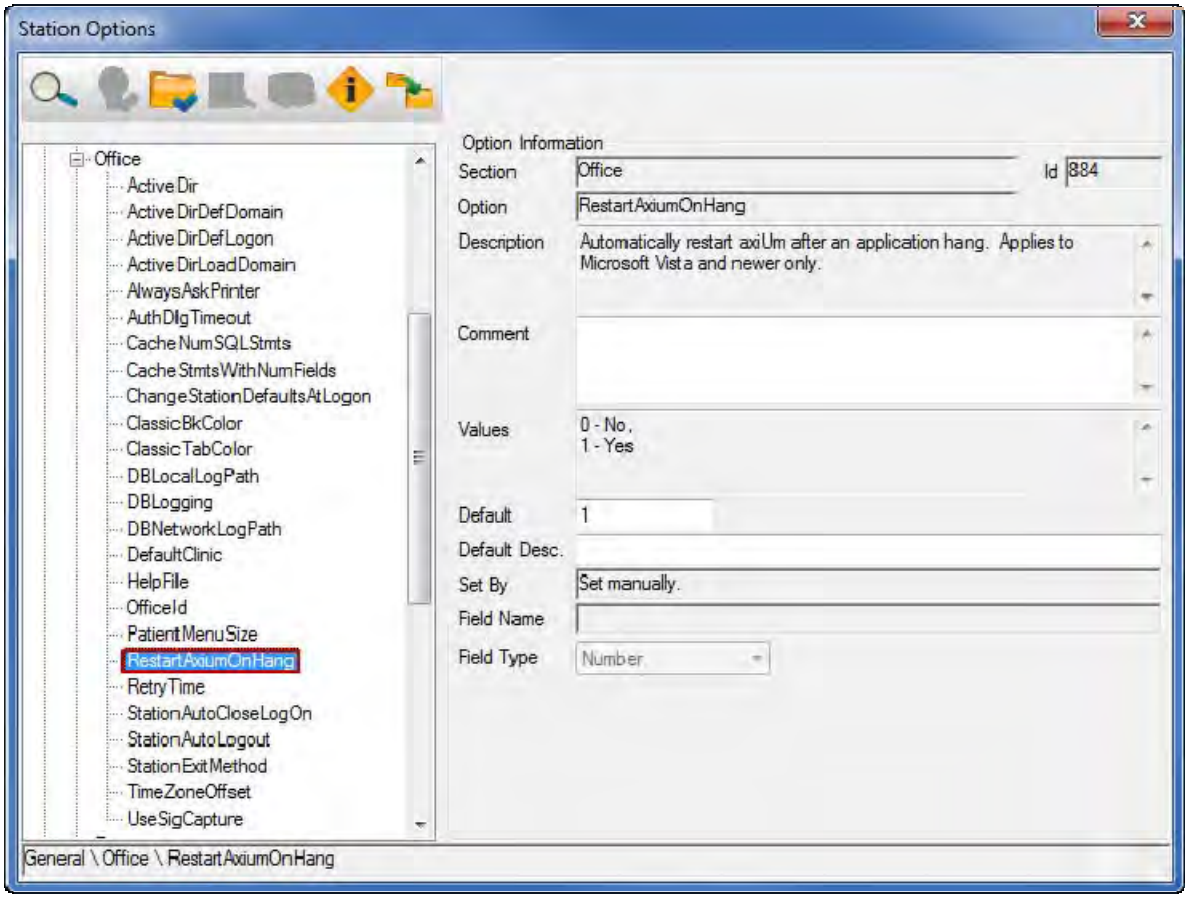
Note: The automatic restart will only work if operating MS Windows Vista or higher and the user must be connected to axiUm for a minimum of 1 minute prior to the unexpected error.

Setup:

1. Open the Station Options window.

   Go to the Maintenance window – System tab – Station Options icon.

2. Go to the General section – Office section – RestartAxiumOnHang item (new).



3. In the Default field, enter one of the following options:
   - 0 – No: Does not automatically restart axiUm after a crash or hang.
   - 1 – Yes: Automatically restarts axiUm after a crash or hang.

133159 – New log records

Module: Logon/logoff

Issue: When your computer automatically shuts down or you manually log off Windows, axiUm does not create the appropriate entries in the log file to record these events.

Enhancement: Now axiUm creates the following entries in the log file:

- End Session Critical: Windows automatically shut down your computer (e.g. after running OS updates).
- End Session Logout: You manually logged off Windows.

If you go to the Info Manager module and run the Logon History report, the names of these two new log entries are displayed in the Log Action column.

133427 – Improved temporary passwords for IUsers

Module: Database

Issue: When you generate a new temporary password for an Exan PatientAcces user (by going to the Patient Info window – Personal tab – Information section – Internet Access button – Internet Access window – Account tab, and clicking the Regenerate button), axiUm creates a creates a random, six-digit numeric password. Need to improve the security these temporary passwords.

Enhancement: Now when you generate a new password, axiUm generates a 10-character random alphanumeric password that includes uppercase and lowercase characters, numbers, and special characters. This increases the security of temporary passwords for IUsers.

135084 – CQM (Clinical Quality Measures) Export feature

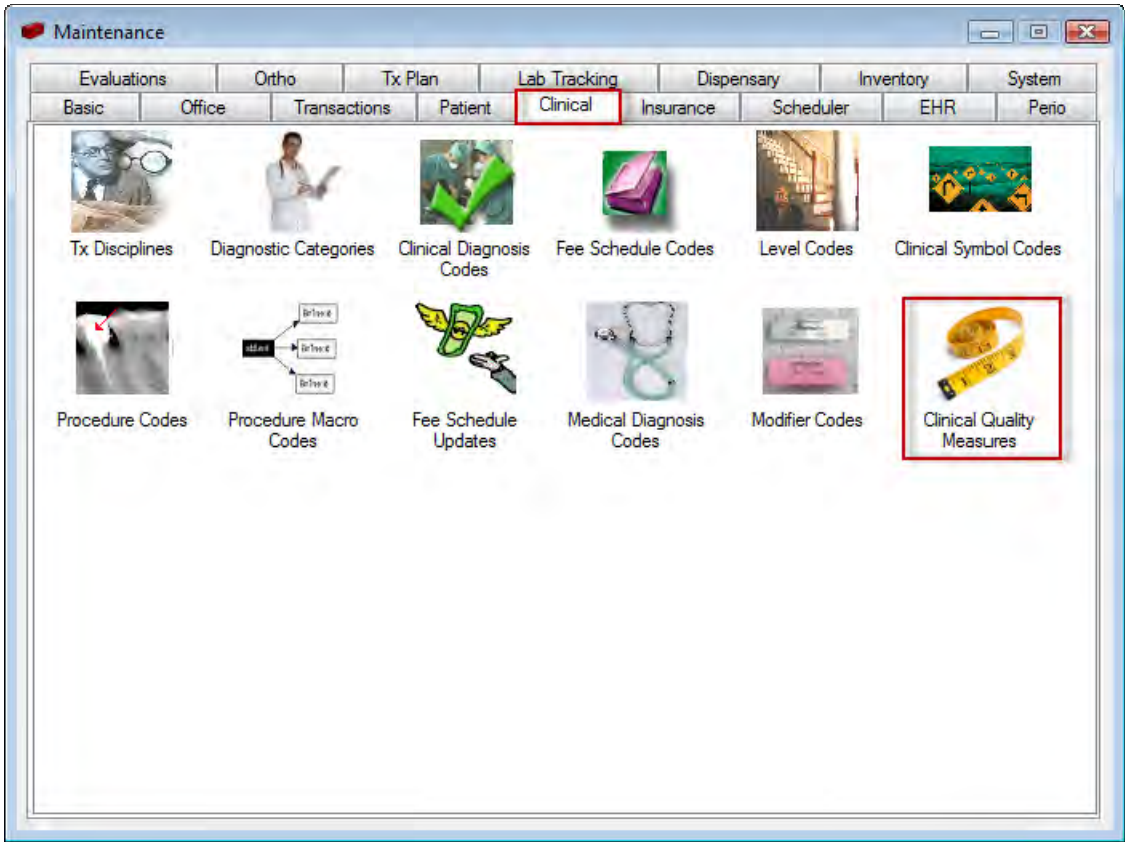
Module: Other

Issue: This enhancement request is for axiUm CE (US only) version and is to help fulfill Meaningful Use objective CORE 10 (i.e. Certification and Meaningful Use). This enhancement provides the ability to export Clinical Quality Measures (CQM) in PQRI XML Specification. The enhancement needs to provide the ability to define and run these Clinical Quality Measures.

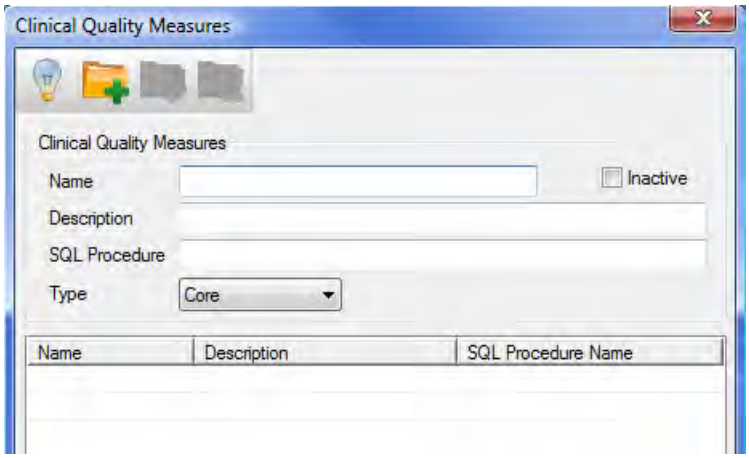
Enhancement: Now has the ability to define and run clinical quality measures.

Quality measures setup:

1. Go to the Maintenance window and click the Clinical tab.
   There is a Clinical Quality Measures icon (new).



2. Click the Clinical Quality Measures icon (new).
   axiUm displays the Clinical Quality Measures window (new).



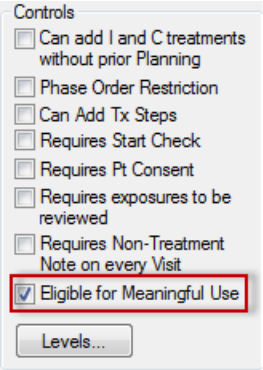
   Use this window to configure clinical quality measures.

Provider setup:

6. Open the Users window.
   Go to Maintenance module - Office tab - Users icon - Users List window - run a search - select a record - (Edit Record).

7. Click the Provider tab and go to the Controls section.

8. Select the Eligible for Meaningful Use checkbox (new).



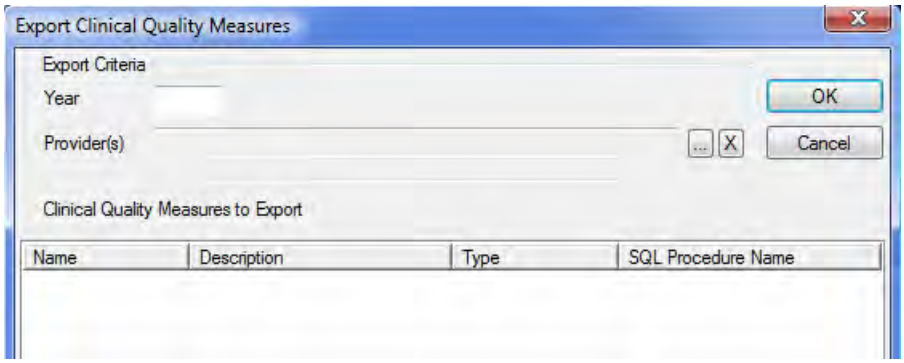
This checkbox, if selected, qualifies this provider to be used for clinical measures reporting. When you go to the Export Clinical Quality Measures window (new, see below), this provider is available for you to select.

Usage:

1. Open the Utilities window.
   Go to Maintenance window - System tab - Utilities icon.

   There is an Export Measures button (new).

2. Click on the Export Measures button (new).
   axiUm displays the Export Clinical Quality Measures window (new).



Use this window to generate an export file on clinical quality measures. axiUm creates the export file on the server in the Oracle directory. This is a directory you define in Oracle that points to a specific folder that the Oracle server has access to.

3. Enter the filter criteria.

   Note: In the Provider(s) field, you can enter only those providers who qualify for quality measures reporting. These are the providers with the Eligible for Meaningful Use checkbox (new) selected in the Users window's Provider tab.

4. Click the OK button.
   axiUm runs the export process and creates export files.

Info Manager

42200 - Improved user and level access

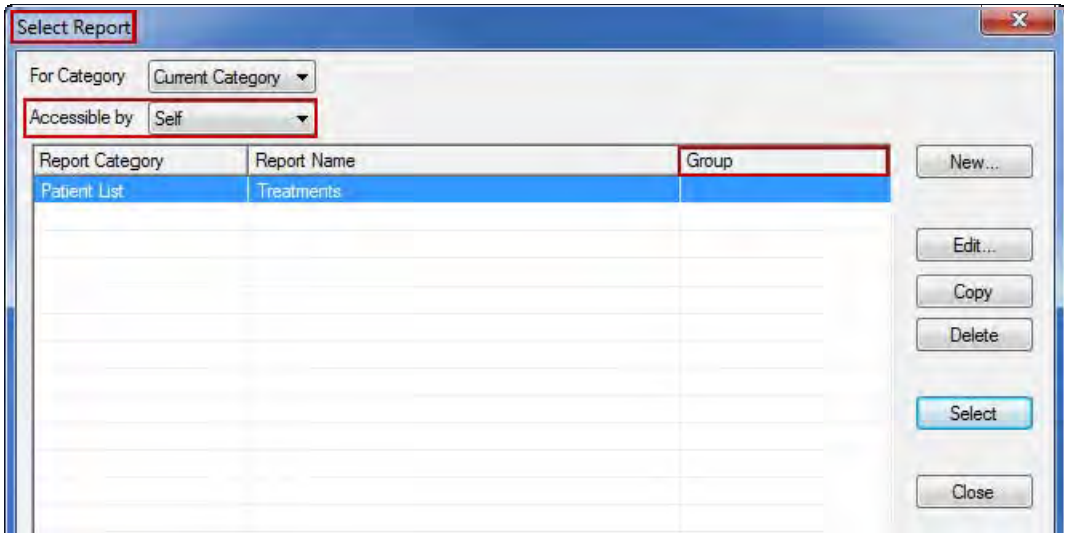
Module: Info Manager

Issue: A pre-defined report, letter, or label can be given access to Self, User, or Level. However, there is no option to give access to specific users within a level, multiple users from different levels, or read-only access to a user or level. Also, if a user creates a report, letter, or label, and gives access to a different user, the original author will no longer have access to that item.

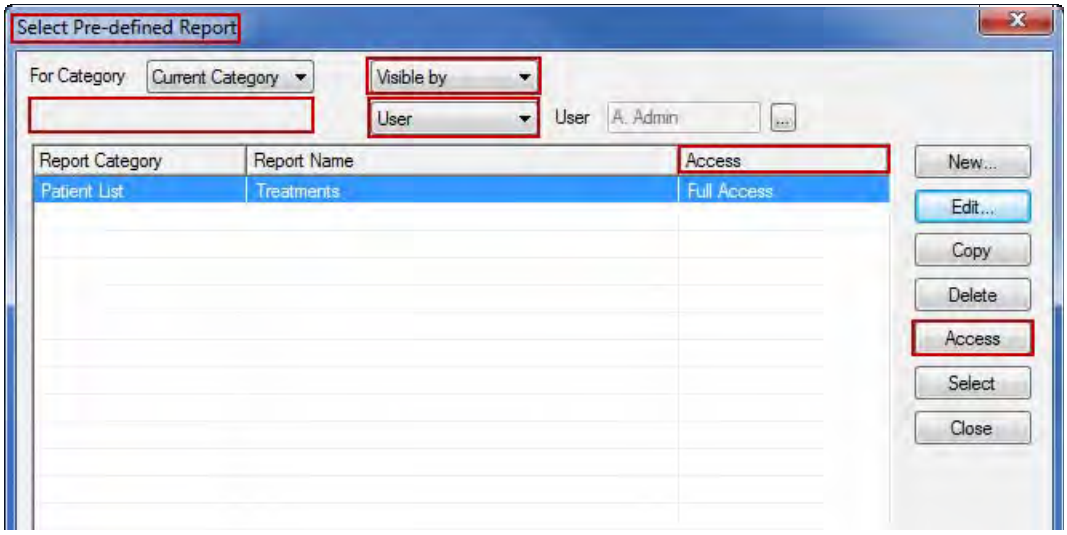
Enhancement: Access can be granted to users and levels, and individuals within those groups. No, Full Access, and Read Only options are now available in the Pre-defined Report Access window, Pre-defined Report Exceptions (by User) window, Letter Template Access window, Letter Template Exceptions (by User) window, Label Template Access window, and Label Template Exceptions (by User) window. There are also changes to the Select Pre-defined Report window (renamed), Select Letter Template window, and Select Label Template window. These changes affect which reports are shown in the list. The list can be displayed according to who created it (Created by), who can see it (Visible by) by User, or who can see it (Visible by) by Level. The column headers change according to what has been selected.

Select Pre-defined Report window (changed)

Current:



New:



- The Select Report window has been renamed the Select Pre-defined Report window (changed).
- The Accessible by drop-down list box has been split into two drop-down list boxes (new).
- The Group column header has been renamed the Access column header (changed).
- The Access button has been added (new).
- Clicking the Access button (new) opens the Pre-defined Report Access window (new).

Report Definition window (changed)

Current:

Report Definition

Files

Patient
Provider
Provider Type
Patient Provider
User
Location
Physician
Patient Dates
Patient Balance
Patient Stage
Patient Manager
Patient Manager Info
Patient Type
Patient Summary
Audit Patient Summary
Audit Patient Summary User Info
Audit Patient Summary Station Info
Audit Info
Audit User Info
Station
Patient Guarantor
Guarantor
Patient Faculty

Fields

Pt. PatientId
Pt. FamilyId
Pt. Chart
Pt. Last
Pt. First
Pt. Preferred
Pt. Middle
Pt. Title
Pt. Address1
Pt. Address2
Pt. City
Pt. State/Prov
Pt. Zip/Postal
Pt. County
Pt. Country
Pt. Address Incorrect
Pt. Contact Phone
Pt. Home Area
Pt. Home Phone
Pt. Work Area
Pt. Work Phone
Pt. Work Ext
Pt. Mobile Area

OK
Cancel
Add

Sort By

Selected

Patient.Pt. PatientId
Patient.Pt. Address1
Patient.Pt. Address2
Patient.Pt. City
Patient.Pt. State/Prov
Patient.Pt. Zip/Postal
Patient.Pt. County
Patient.Pt. First
Patient.Pt. Last

Operation...
Remove

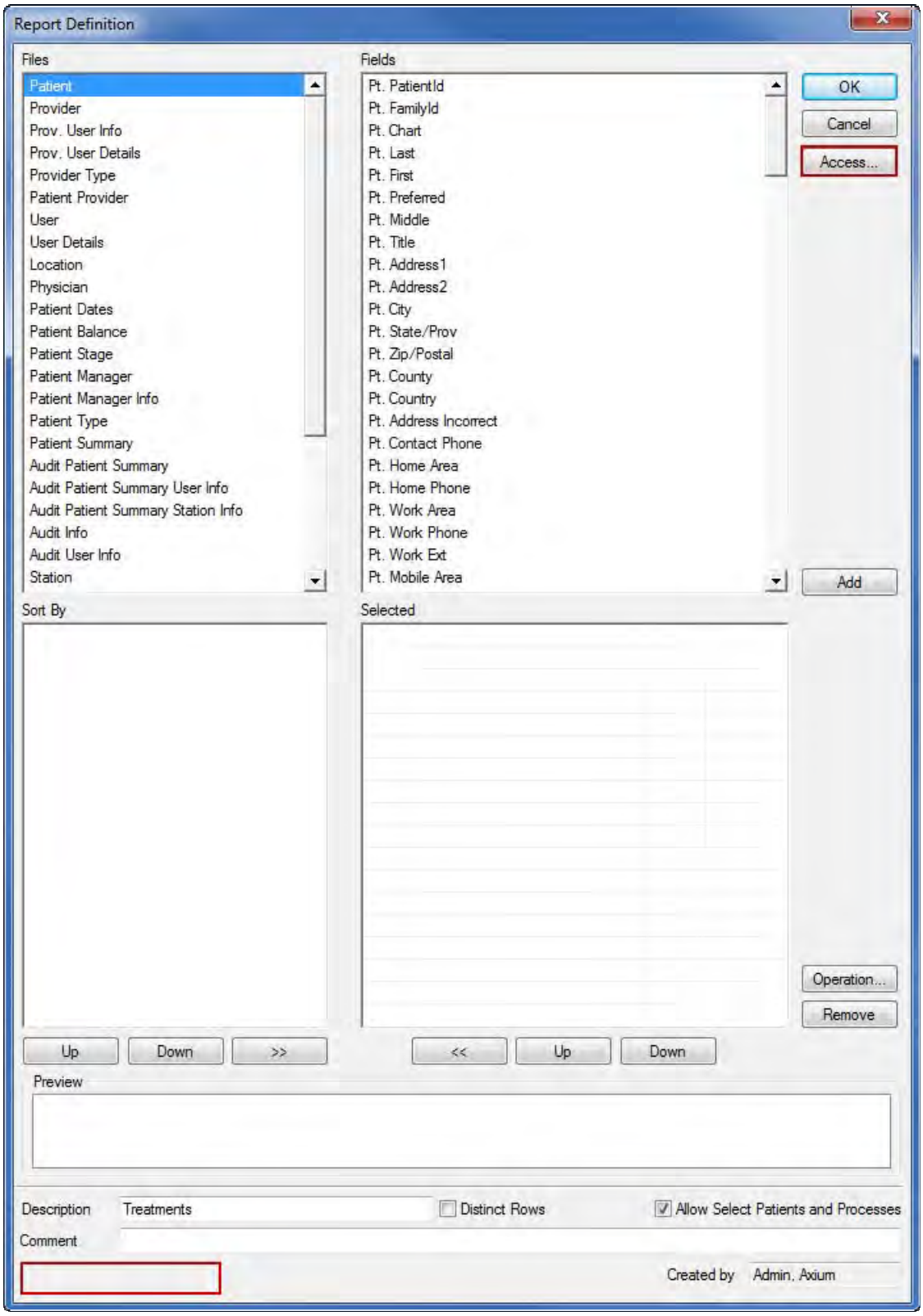
Up Down >> << Up Down

Preview

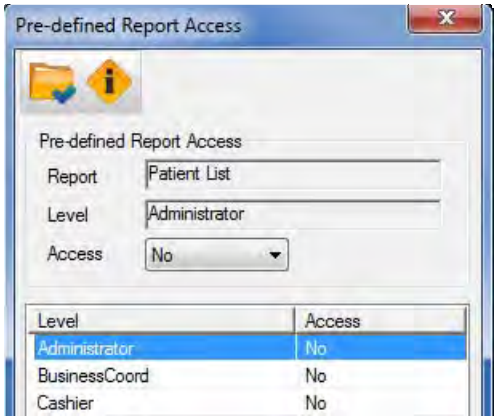
Pt. PatientId Pt. Address1 Pt. Address2 Pt. City Pt. State/P... Pt. Zip/Pos... Pt. County Pt. First Pt. Last

Description Treatments
Distinct Rows
Allow Select Patients and Processes
Comment
Accessible by Self
Created by Admin. Axium

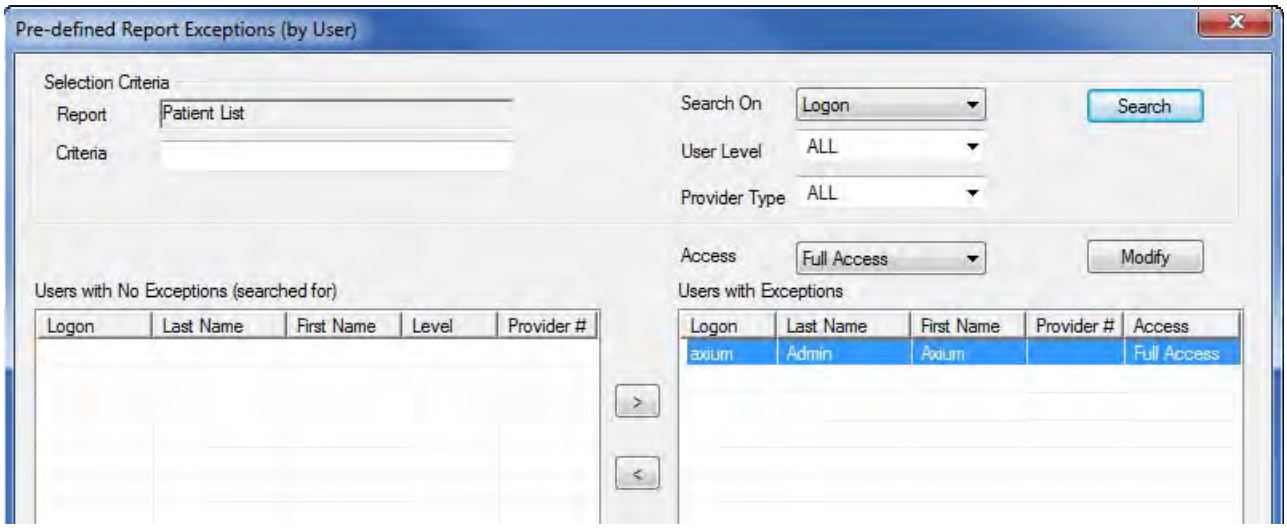
New:



- The Accessible by drop-down list box has been removed.
- The Access button has been added (new).
- Clicking the Access button (new) opens the Pre-defined Report Access window (new).

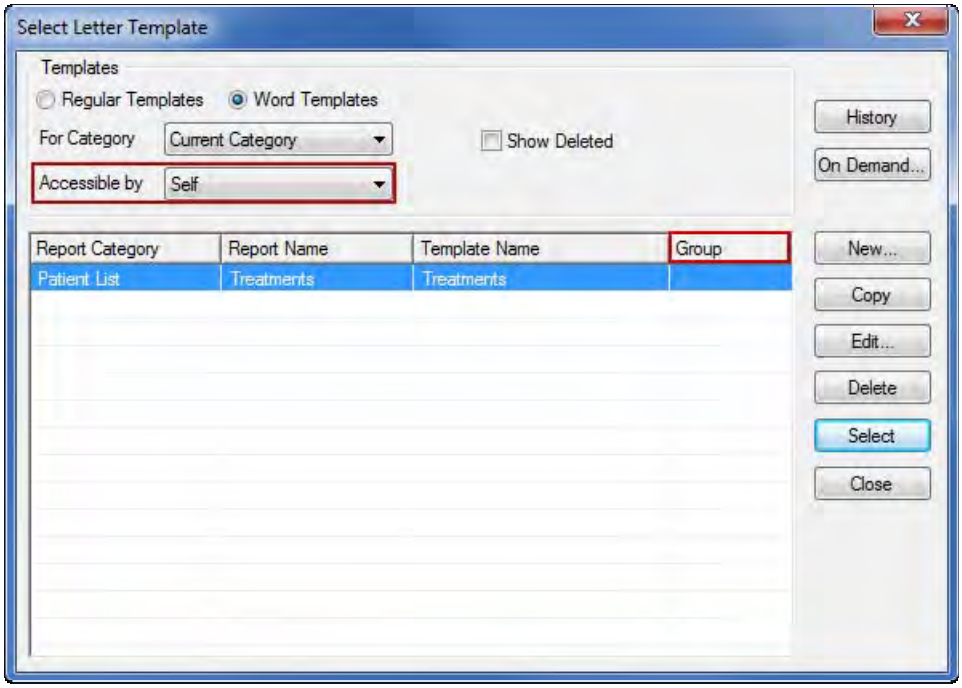


- Clicking  (User Access) opens the Pre-defined Report Exceptions (by User) window (new).

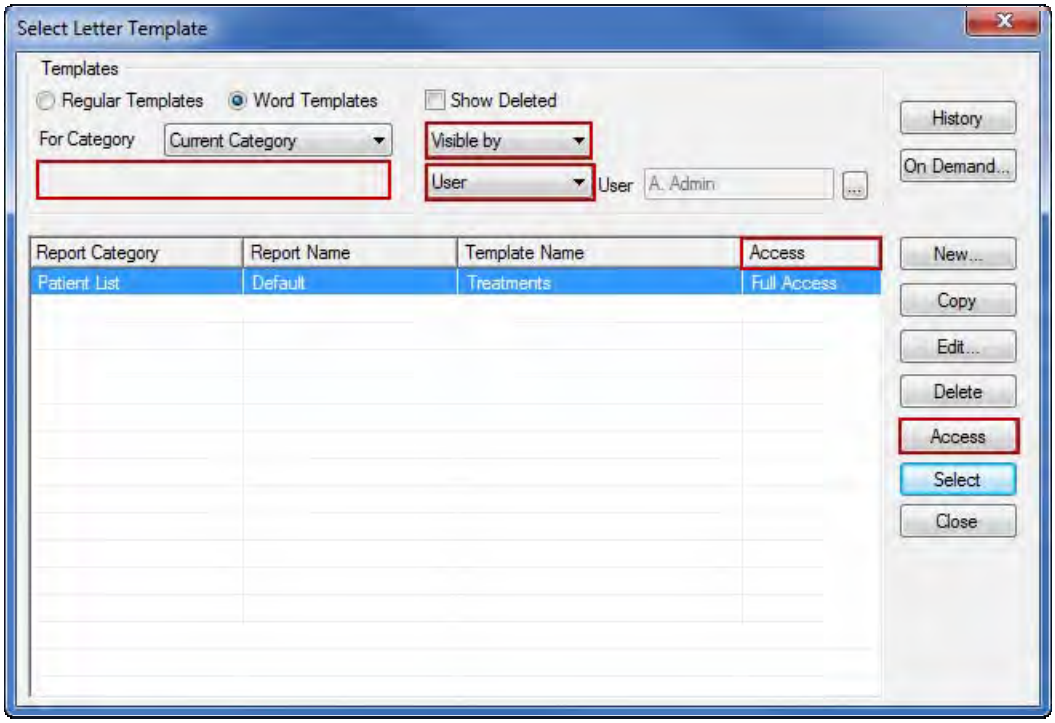


Select Letter Template window (changed)

Current:



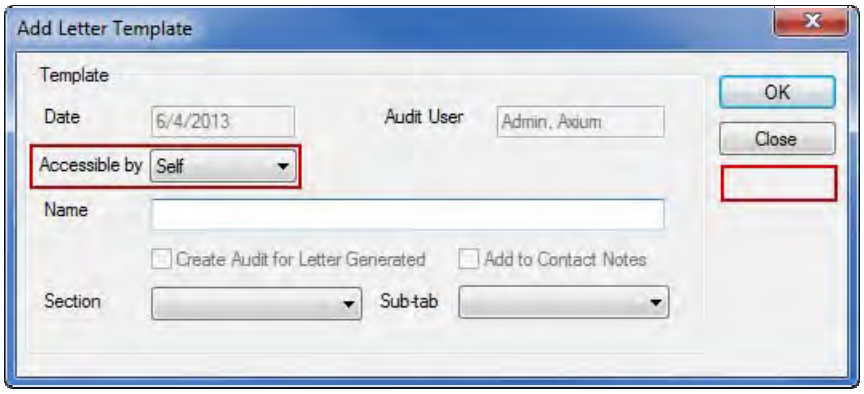
New:



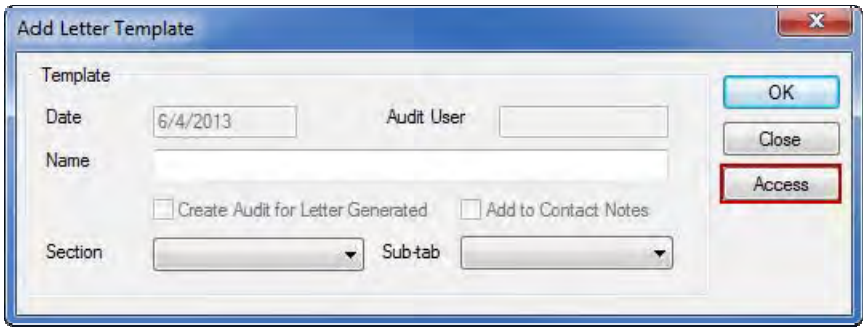
- The Accessible by drop-down list box has been split into two drop-down list boxes (new).
- The Group column header has been renamed the Access column header (changed).
- The Access button has been added (new).
- Clicking the Access button (new) opens the Letter Template Access window (new).

Add Letter Template window (changed)

Current:



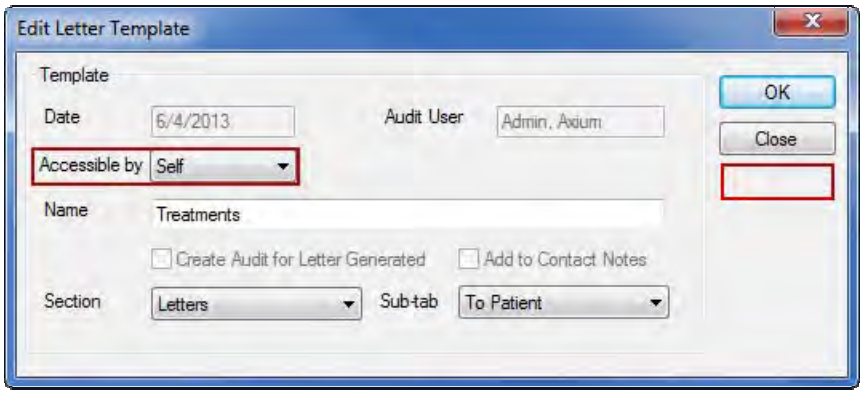
New:



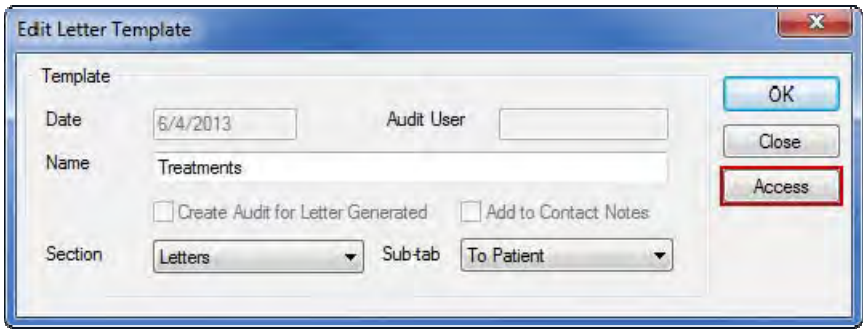
- The Accessible by drop-down list box has been removed.
- The Access button has been added (new).
- Clicking the Access button (new) opens the Letter Template Access window (new).

Edit Letter Template window (changed)

Current:



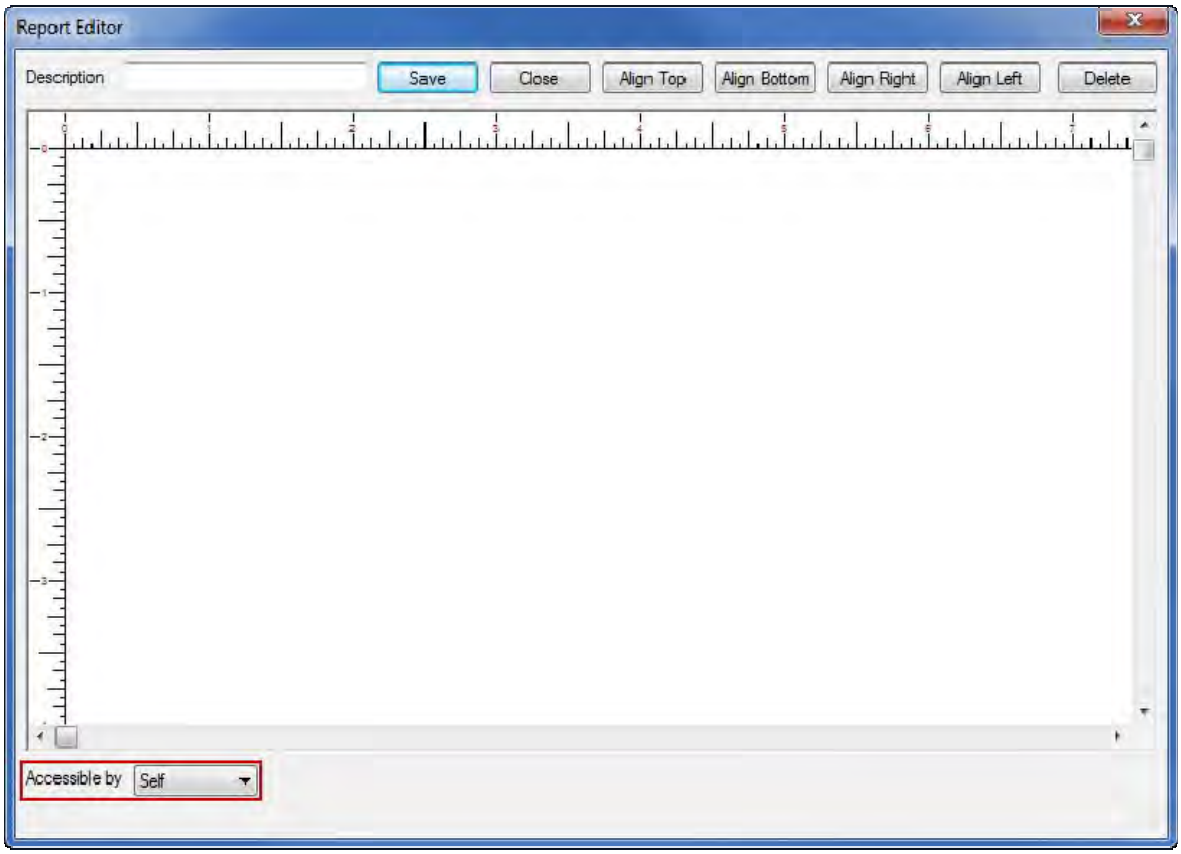
New:



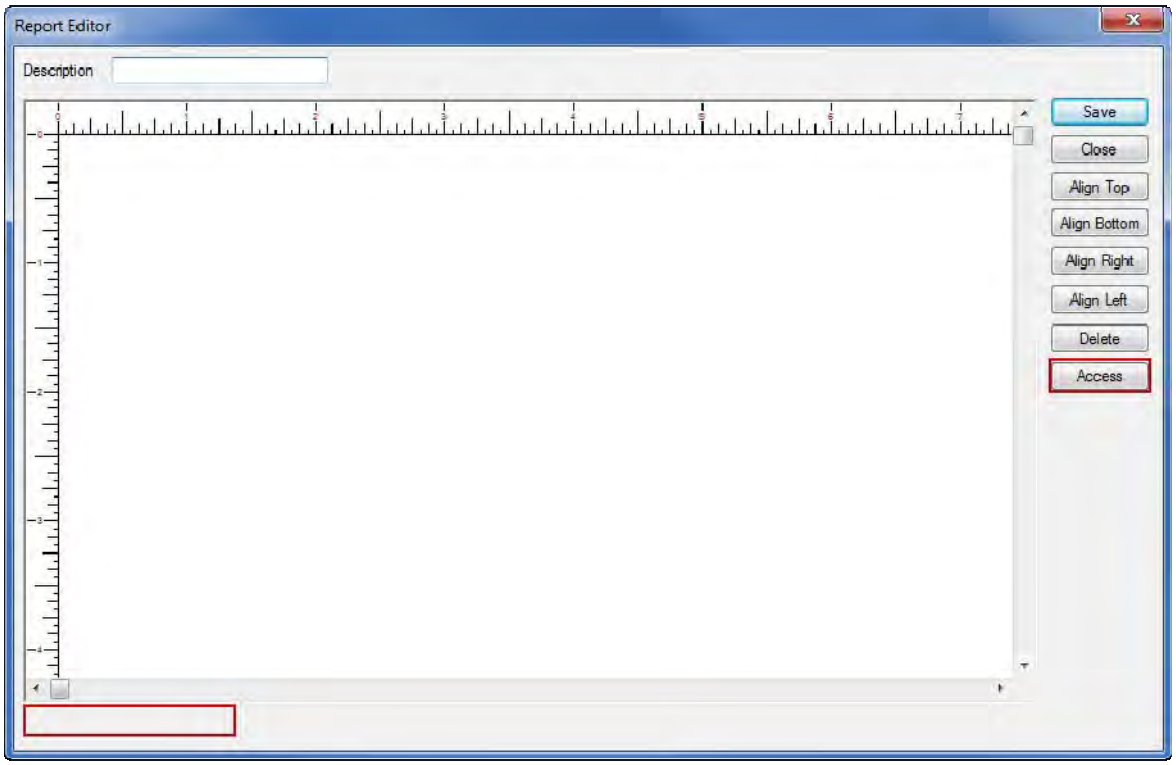
- The Accessible by drop-down list box has been removed.
- The Access button has been added (new).
- Clicking the Access button (new) opens the Letter Template Access window (new).

Report Editor (Letter) window (changed)

Current:

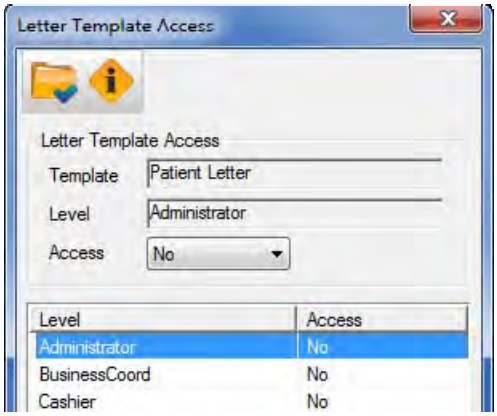


New:



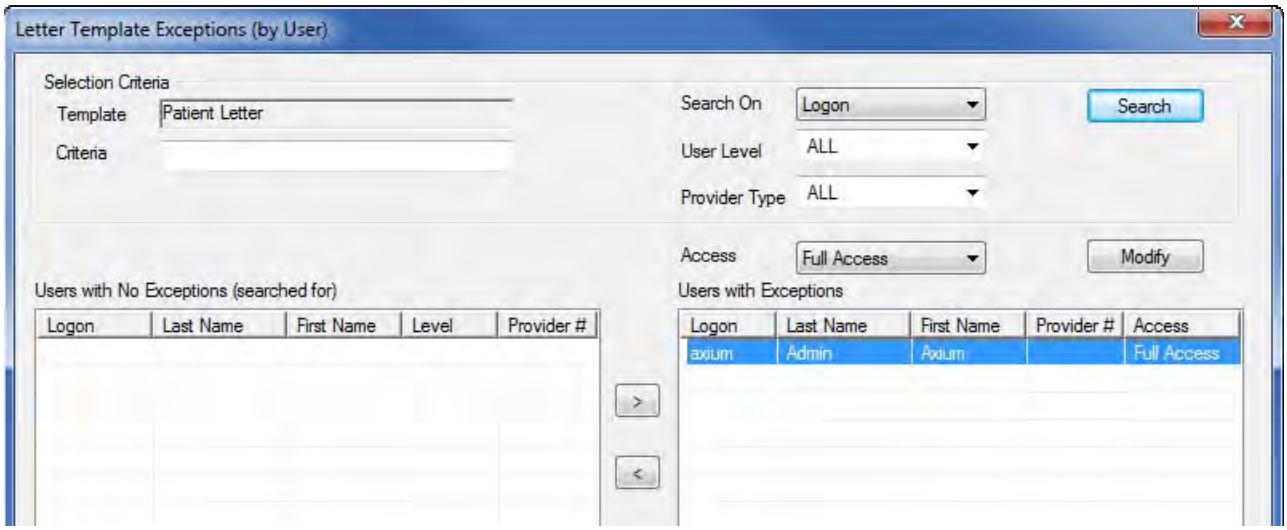
- The Accessible by drop-down list box has been removed.
- The horizontal button group has been changed to a vertical button group.
- The Access button has been added (new).
- Clicking the Access button (new) opens the Letter Template Access window (new).

Letter Template Access window (new)



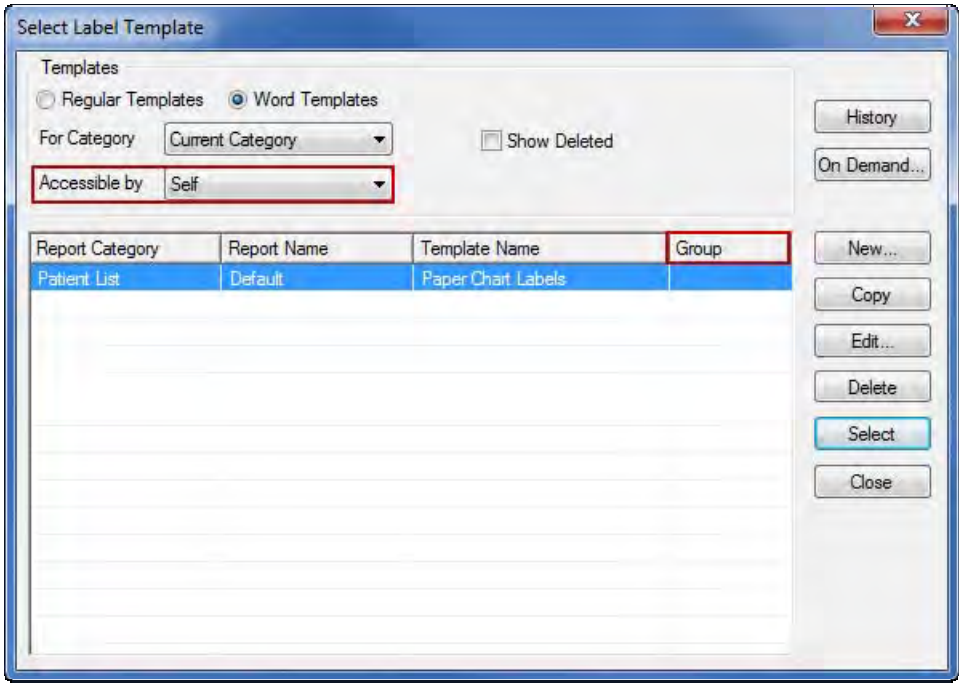
- Clicking  (User Access) opens the Letter Template Exceptions (by User) window (new).

Letter Template Exceptions (by User) window (new)

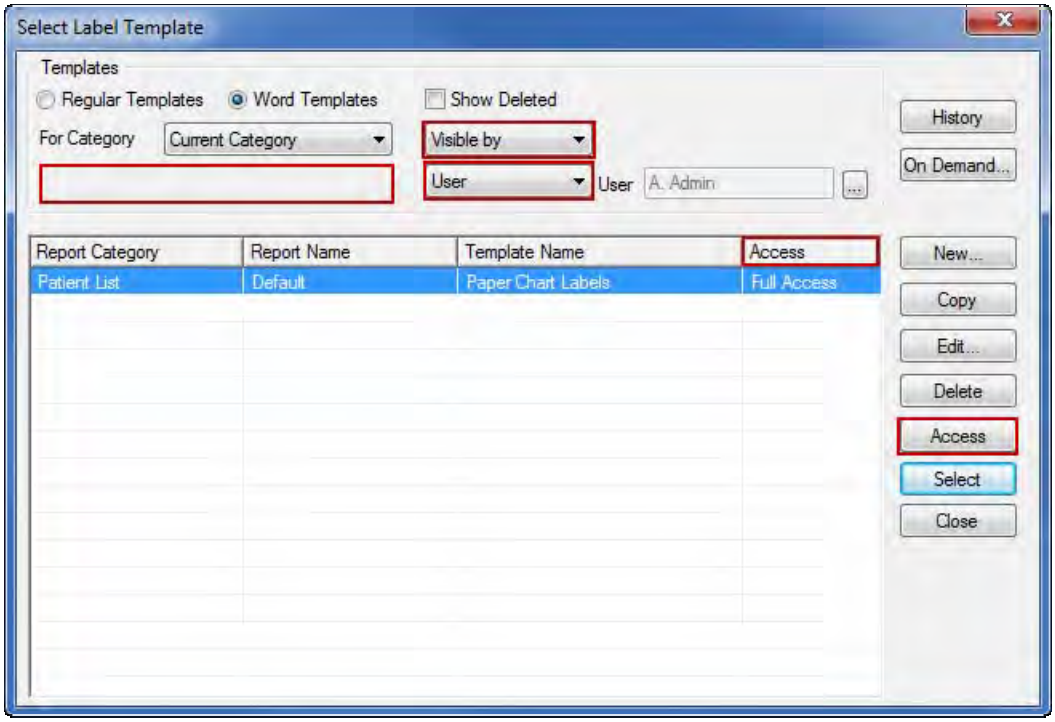


Select Label Template window (changed)

Current:



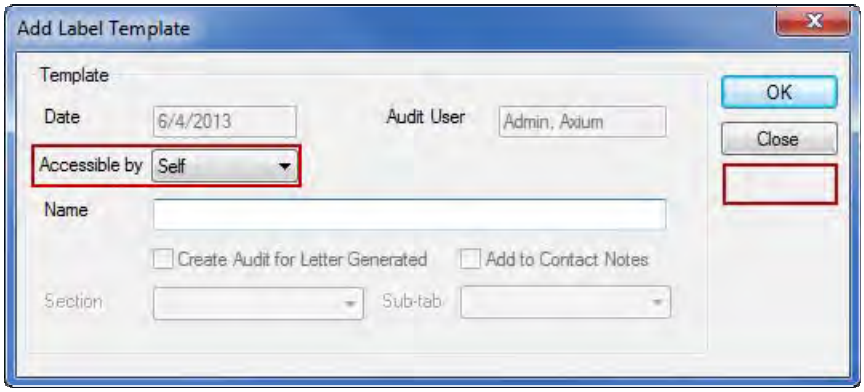
New:



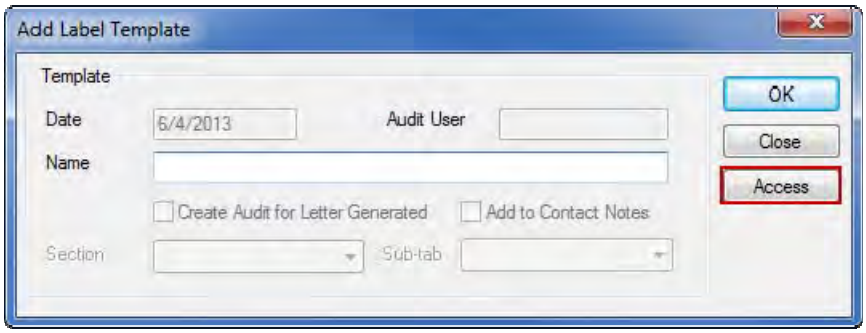
- The Accessible by drop-down list box has been split into two drop-down list boxes (new).
- The Group column header has been renamed the Access column header (changed).
- The Access button has been added (new).
- Clicking the Access button (new) opens the Letter Template Access window (new).

Add Label Template window (changed)

Current:



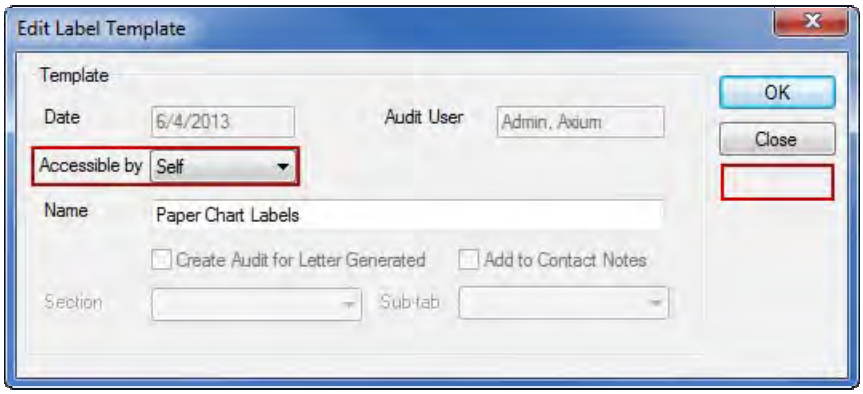
New:



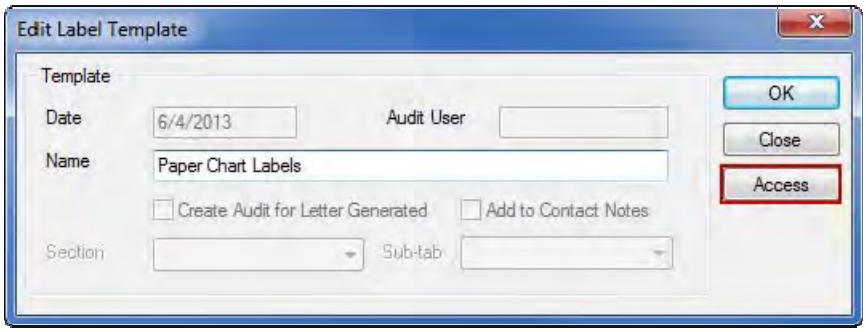
- The Accessible by drop-down list box has been removed.
- The Access button has been added (new).
- Clicking the Access button (new) opens the Label Template Access window (new).

Edit Label Template window (changed)

Current:



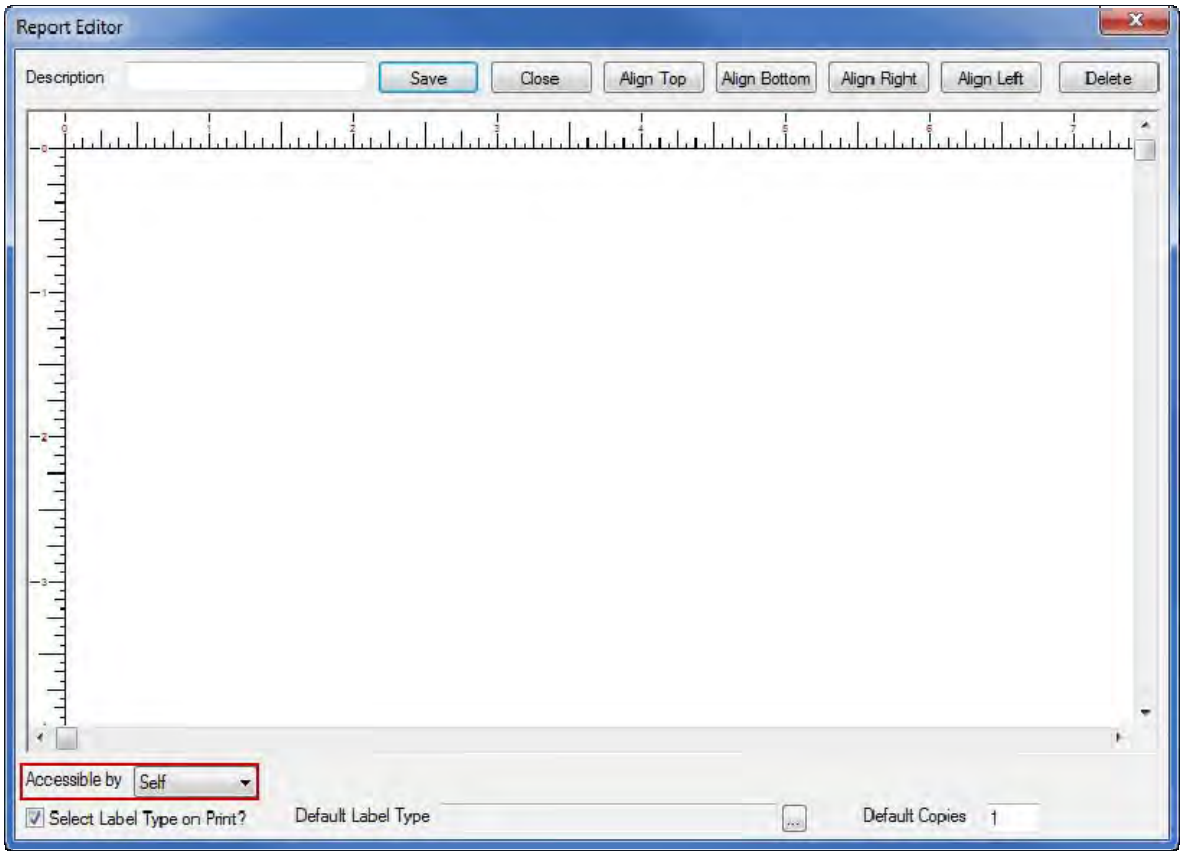
New:



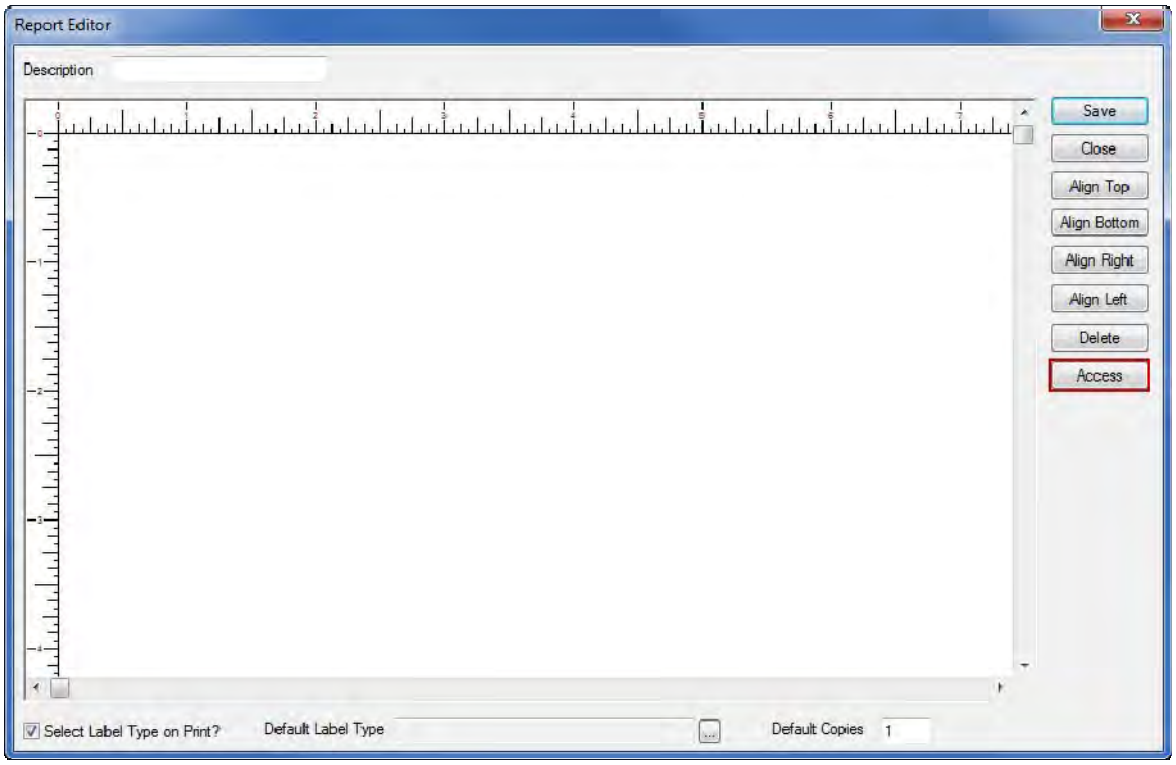
- The Accessible by drop-down list box has been removed.
- The Access button has been added (new).
- Clicking the Access button (new) opens the Label Template Access window (new).

Report Editor (Label) window (changed)

Current:

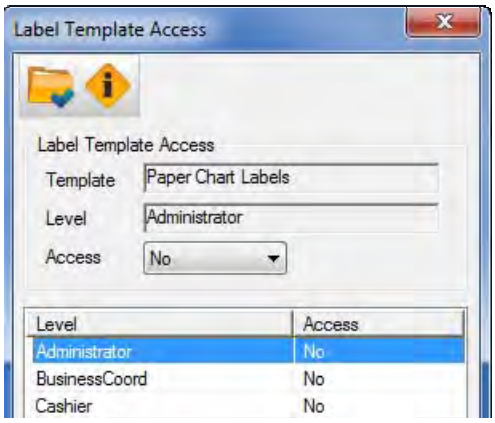

Report Editor
Description
Save
Close
Align Top
Align Bottom
Align Right
Align Left
Delete
Accessible by
Self
Select Label Type on Print?
Default Label Type
Default Copies
1

New:


Report Editor
Description
Save
Close
Align Top
Align Bottom
Align Right
Align Left
Delete
Access
Select Label Type on Print?
Default Label Type
Default Copies
1

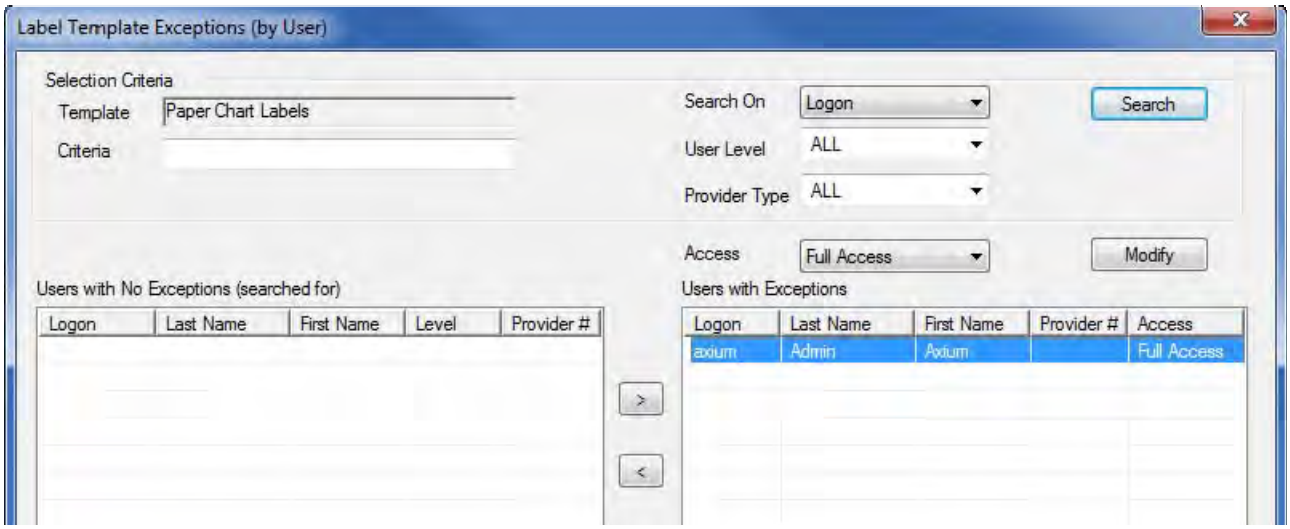
- The Accessible by drop-down list box has been removed.
- The horizontal button group has been changed to a vertical button group.
- The Access button has been added (new).
- Clicking the Access button (new) opens the Label Template Access window (new).

Label Template Access window (new)



- Clicking  (User Access) opens the Label Template Exceptions (by User) window (new).

Label Template Exceptions (by User) window (new)



Note: The Created by option changes the Access column header to the Accessible by column header in the Select Pre-defined Report window, Select Letter Template window, and Select Label Template window.

Report Category	Report Name	Template Name	Accessible by
Patient List	Default	Ortho Letter	A. Admin
Patient List	Default	Patient Letter	*
Patient List	Default	Treatment Letter	A. Admin, ...
Patient List	Default	Welcome Letter	Administrator

Example:	A. Axium	Only one user
	*	User plus level
	A. Axium, ...	More than one user
	Administrator	Level only (no user)

46780 – Improvements made to statements

Module: Info Manager ~ Statements report

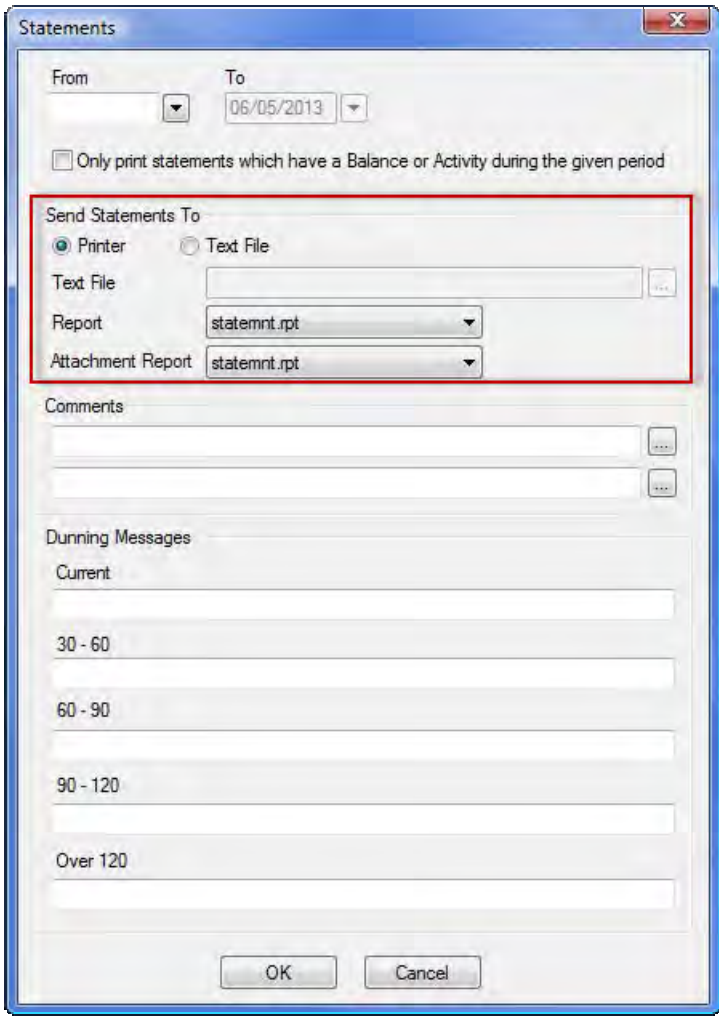
Issue: There are several issues:

- You must run the statements in small batches. Large batches can cause error messages.
- When you print to a generic text-only printer for uploading to Emdeon, axiUm prompts for the file name at the end of the process.
- Large batches of statements take a very long time to run, especially when you add statements as patient attachments.

Enhancement:

- When you run large batches of statements, axiUm breaks them into smaller batches internally, potentially avoiding error messages. This does not affect the time to create the patient balances portion of the process.
- There are now progress indicators during processing.
- When you send statements to a text file, axiUm prompts for the text file name at the beginning of the batch rather than at the end. When printing statements, axiUm prompts for the printer at the beginning of the processing rather than at the end.
- Improved the speed of creating patient attachments for statements/batches.
- There are new fields in the Statements window.

  Note: If your institution has only one statement report, these new fields will be hidden.



- When you select the Printer option (new), axiUm prompts for the printer before printing. When you select the Text File option (new), you can indicate the name and path of the output file in the Text File field (new).

- The Report drop-down field (new) indicates the name of the statement to either print or to create for the text file.

- The Attachment Report drop-down field (new) indicates the name of the statement to attach as a patient attachment.

In the Station Options window (in Maintenance window – System tab – Station Options icon), the Info Manager section – Statements section displays five new options that correspond to the new fields and options in the Statements window:

- AttachReport
  This is the name of the statement to be attached as a Patient Attachment. (Attachment Report field in Statements dialog

- PrintBatchSize
  This is number of statements to create for each batch. The default is 50.

- SendToDefault

  This will default the Statements window to send statements to either the Printer or Text File.
  - 0 - Printer
  - 1 - Text File or Attachments Only (see SendToOptions)

- SendToOptions

  Sets the available options for where to send the statement batch.
  - 0 - printer or text file
  - 1 - printer or attachments only (for suppressing the batch print job). This will create the statements, create the attachments but suppress the final print job (for batch statements).

- TextFile

  This is the name and path of the text file to use when sending statements in a batch to a clearing house such as Emdeon.

68549 – CheckOutDate & CheckOutTime added to Appointment reports

Module: Info Manager

Issue: Users would like to more accurately track how long a patient was in a clinic for an appointment. They need the ability to update the check out time because this process is not always being done on time. This should also be included in reports.

Enhancement: The 'Pt. Times' button has been added to the 'Edit Appointment' dialog, so that users can view and update Sign In Time, Check In Time, Seated Time, Check Out Date, and Check Out Time. Users can now report on these fields from the Info Manager.

Enhancement 1: The Pt. Times button has been added to the Edit Appointment window and the Appointment History window. Sign In Time, Check In Time, Seated Time, Check Out Date, and Check Out Time can be updated in the Patient Appointment Times window.

Edit Appointment window (changed)

Current:

Edit Appointment

Patient
Miss Tse, Maria - 239
2337 Royal Oak Street
Mableton, GA, 30126
Home (770) 456-1414
Work (210) 452-5471
Mobile ()
Other ()
Contact Home

Pt Information
Pt Status Active Patient
Time
Pref. Time 9.00
Pt Now Due 14.25
Pt Estimate Recalculate

Appointment
Provider D555
2nd Provider
Appt. Code 15MIN
Tx Discipline
Appt. Status
Recall

Appt Details
Time Fri, Jun 7, 2013 01:00 pm to 01:15 pm
Chair DC07
Made on Fri, Jun 7, 2013
Last user Admin, Axium
Sooner if possible Short Notice

Reason

Accept
Cancel
Add1 Providers
Tx. Plan...
Recalls...
Notes...

New:

Edit Appointment

Patient
Mr. Benson, Joseph - 265
3 Hobbs Place
Michigan, NE, 68862
Home (308) 235-3454
Work (308) 211-1111 78
Mobile ()
Other ()
Contact Home

Pt Information
Pt Status Active Patient
Time
Pref. Time 9.00
Pt Now Due 0.00
Pt Estimate Recalculate

Appointment
Provider D171
2nd Provider
Appt. Code 060 MIN
Tx Discipline
Appt. Status
Recall

Appt Details
Time Fri, Jun 7, 2013 01:00 pm to 02:00 pm
Chair DC01
Made on Fri, Jun 7, 2013
Last user Admin, Axium
Sooner if possible Short Notice

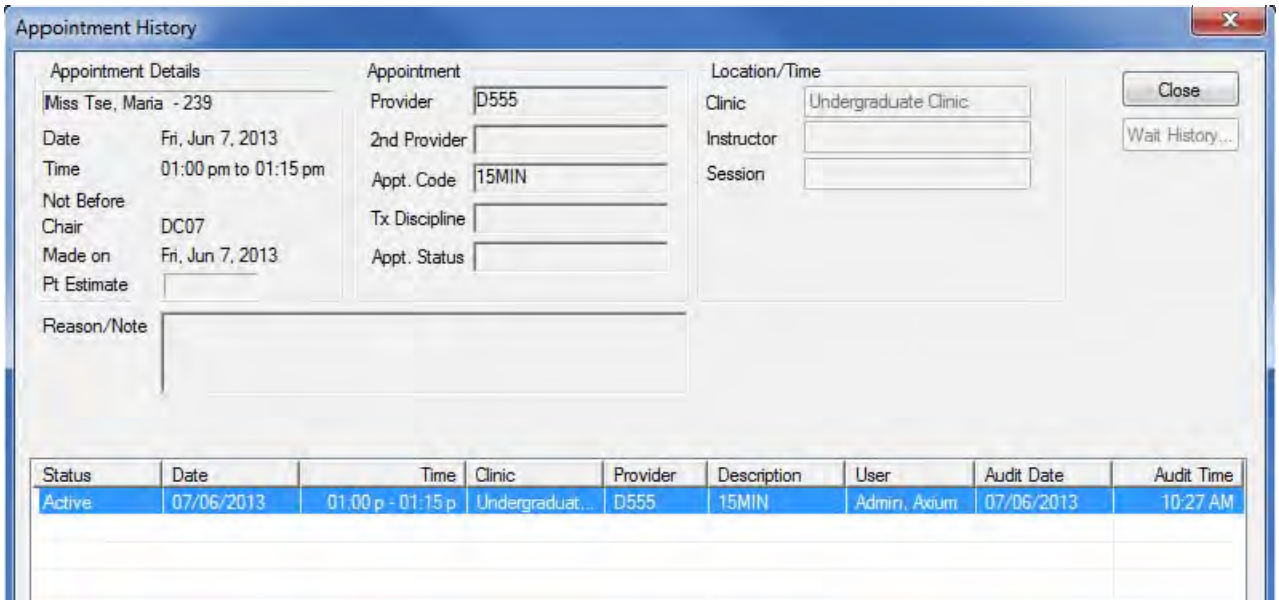
Reason

Accept
Cancel
Add1 Providers
Tx. Plan...
Recalls...
Notes...
Pt. Times...

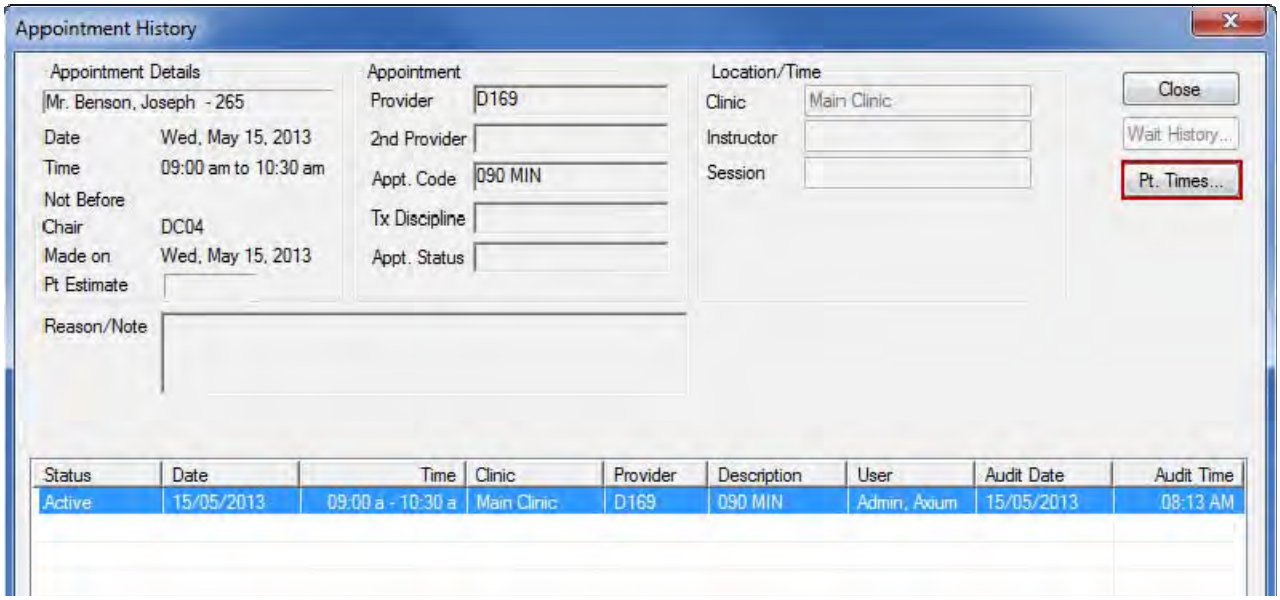
- Clicking the Pt. Times button (new) opens the Patient Appointment Times window (new).

Appointment History window (changed)

Current:

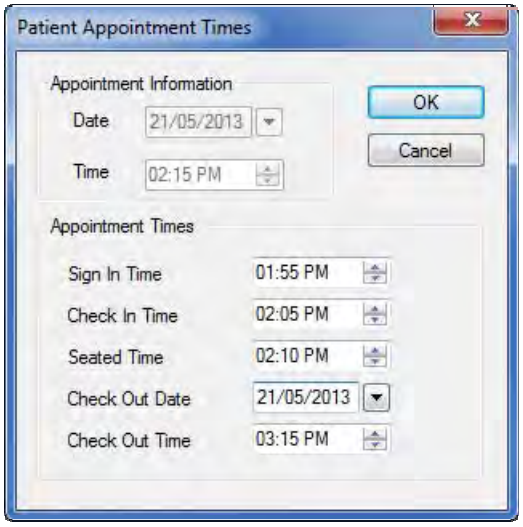


New:



- Clicking the Pt. Times button (new) opens the Patient Appointment Times window (new).

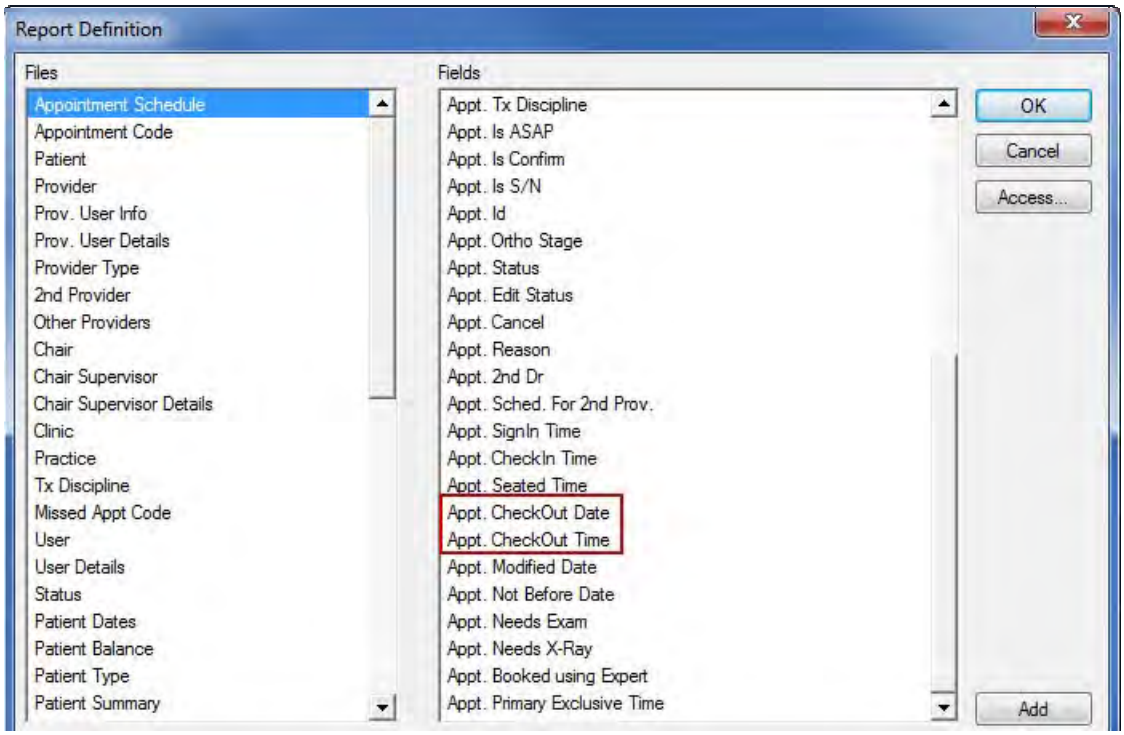
Patient Appointment Times window (new)



- The Sign In Time, Check In Time, Seated Time, Check Out Date, and Check Out Time fields are editable.

Enhancement 2: Check out date and check out time can be shown in Appointment reports.

Report Definition window (changed)



- Appt. CheckOut Date (new) and Appt. CheckOut Time (new) have been added to the Appointment tab.

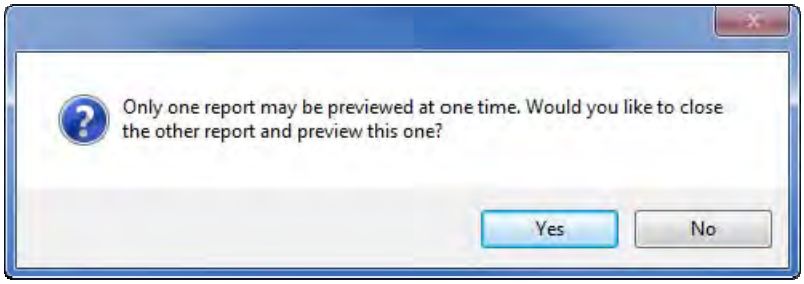
74795 – Crystal custom reports remain open while performing other tasks

Module: Info Manager

Issue: Users would like to keep Crystal custom reports open, while continuing to work in other parts of axiUm.

Enhancement: Users can preview Crystal custom reports, and minimize and move the window to perform other tasks when it is not generating results. Only one Crystal custom report can be previewed at a time.

A warning message will display if a second Crystal custom report is opened.



128381 – To have provider e-mail available in Info Manager

Module: Info Manager

Issue: The provider/user e-mail address is not included in many reports.

Enhancement: The provider/user e-mail address has been added to reports.

The Prov. Email option is available under Prov. User Details in the following Info Manager reports:

Patients tab

- Patient List
- Guarantor List
- Student Check In/Out
- Provider's List
- Overdue Patients
- Overdue Extensions
- Patient Surveys

Insurance tab

- Policy Holders
- Policy Dependents

Billing tab

- Treatments
- Patient Balances
- General Transactions
- Trx Allocations

Appointment tab

- Appointments
- Appointment Procedures
- Wait List
- Chair Reservations
- Patients With Recalls
- Patients With No Active Recalls
- Provider Clinic Time Exceptions
- Provider Work Schedules
- Provider Schedules
- Provider Hold Times
- Provider Scheduling Notes

Clinical tab

- Student Evaluations
- Clinical Charts
- Clinical Charts with Ortho
- Tx Plan General Txs (Legacy)

Clinic Mgt tab

- Dispensary Requests
- Lab Tracking Orders
- Lab Tracking Requests
- Lab Tracking History
- Lab Tracking Costs
- Lab Tracking Weights

Management tab

- Patient Provider History

In addition to Info Manager, the email has also been added to the Patient Assignments module:

- The Prov. Email option is available under Prov. User Details in the Patient tab.
- The User Email option is available under User Details in the Patient Need and Planned Tx tabs.

131658 - Info Manager - Export to Excel option

Module: Info Manager

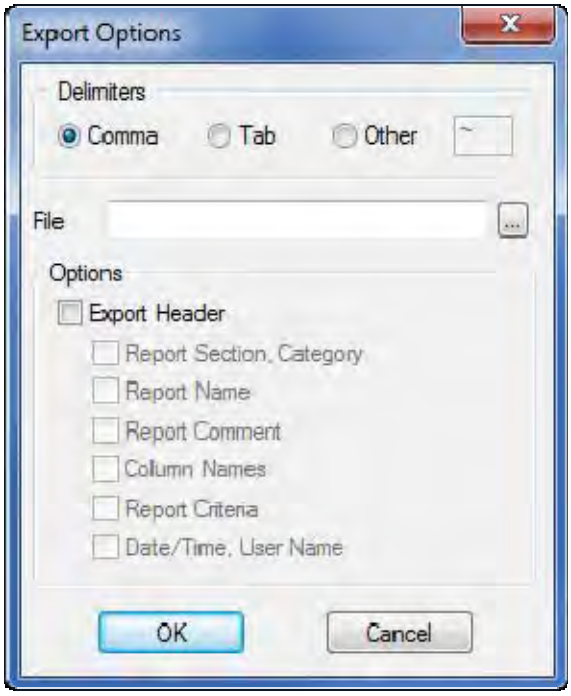
Issue: Users would like to perform calculations, custom sorting, and groupings on report data from the Info Manager.

Enhancement: There is new option to export Info Manager reports to Excel. This provides users the ability to extract data from axiUm for further data mining. A separate Text File option has also been added.

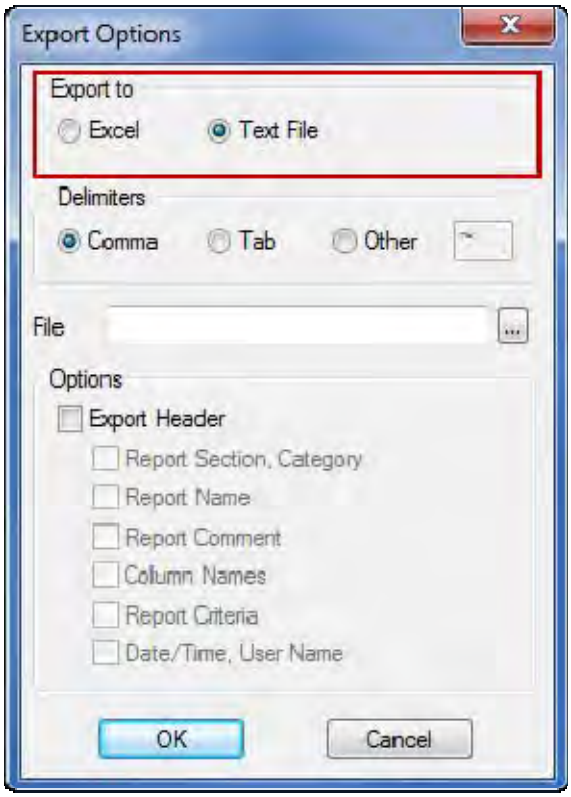
Note: When a report contains date fields, the date format in Excel will match the user's short date format in Windows regional settings. All short date formats are accepted, except those manually

entered in Windows XP or Vista. For example, dddd/dd/MMMM/yyyy (Thursday/24/January/2013) will not be treated as a date format because it contains text for the month and day of week.

Current:



New:



There will be no automatic column resizing in Excel, if Report Name, Report Comment, or Report Criteria export headers are selected.

132540 - Bank fields now available

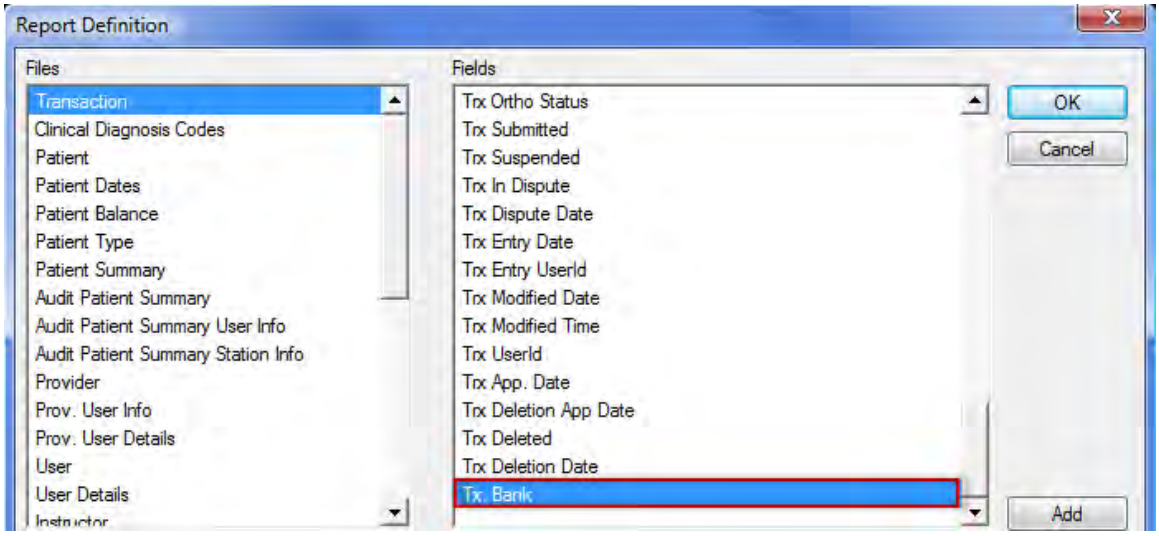
Module: Info Manager ~ Trx Allocations report, General Transactions report

Issue: Need the ability for reports to show the bank used to process payment. When you run a report showing refunds, it is helpful to see which bank the original payment took place.

Enhancement: Now has a Trx Bank field in the following reports:

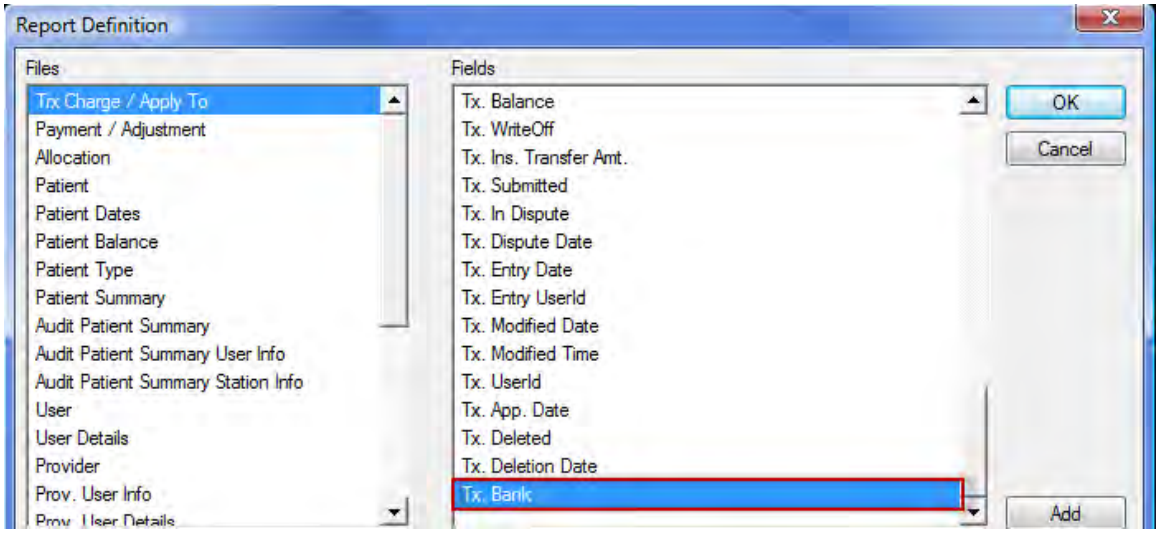
Trx Allocations report

Go to Info Manager - Billing tab - General Transactions category - right-click - Edit Report option - Report Definition window - Transaction file - Tx. Bank field (new).



General Transactions report

Go to Info Manager - Billing tab - Trx Allocations category - right-click - Edit Report option - Report Definition window - Trx Charge / Apply To file - Tx. Bank field (new).



Note: axiUm displays values for the Tx.Bank field only if refund records exist. To report on banks used for regular payments, you must add the Payment/Adjustment.Pmt.Bank Code to the report.

Inventory

67889 - Internal/External order tabs & an easier way to order items in Product Levels tab

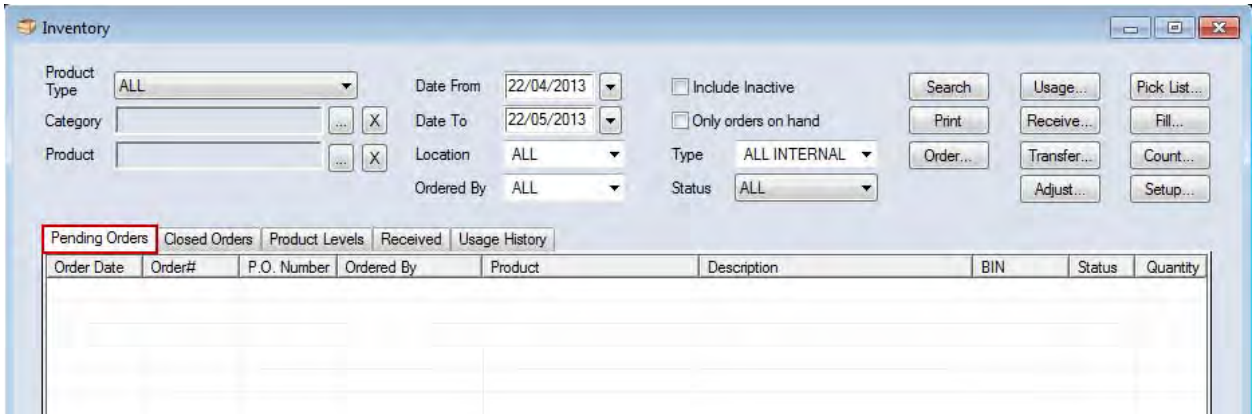
Module: Inventory ~ Inventory window

Issue: The Pending Orders tab handles internal and external orders, which are processed very differently from each other. It is confusing that both of these are in the same tab. There needs to be the ability to set security on the new tabs. Also, users need an easier way to order items when at or below their re-order points, without having to re-enter product information.

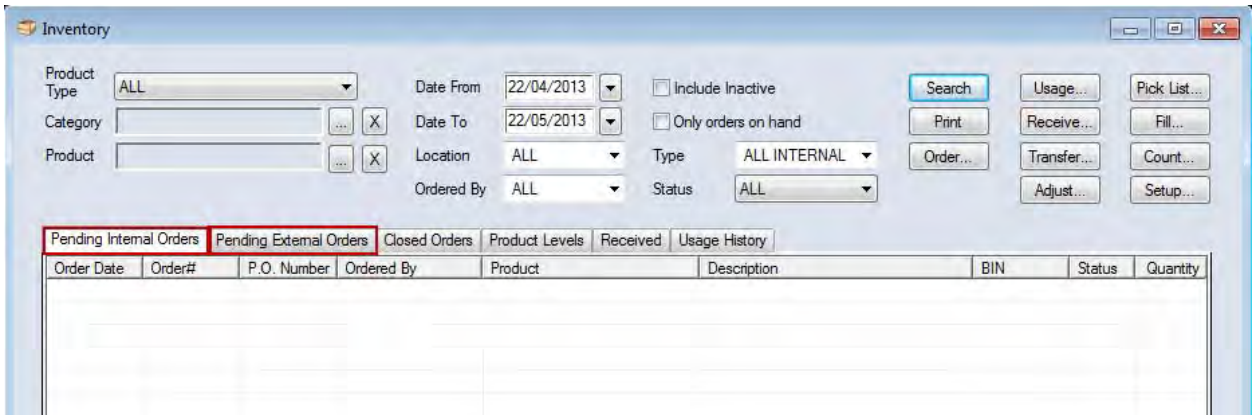
Enhancement: The Pending Orders tab has been split into two tabs: Pending Internal Orders and Pending External Orders. The applicable right-click options for each type of order have been moved to their respective tabs. The functionality for each type of order is no different than in previous versions. In the Product Levels tab, users will filter the list (as before) by using the two check boxes: 'Include Order quantities (to re-order)' and 'Show Quantities.' There is now the ability to multi-select items in the list and select an 'Add Order' right-click option. Security can be set on the two new tabs and the 'Add Order' right-click option.

Enhancement 1: There is now a Pending Internal Orders tab and Pending External Orders tab.

Current:

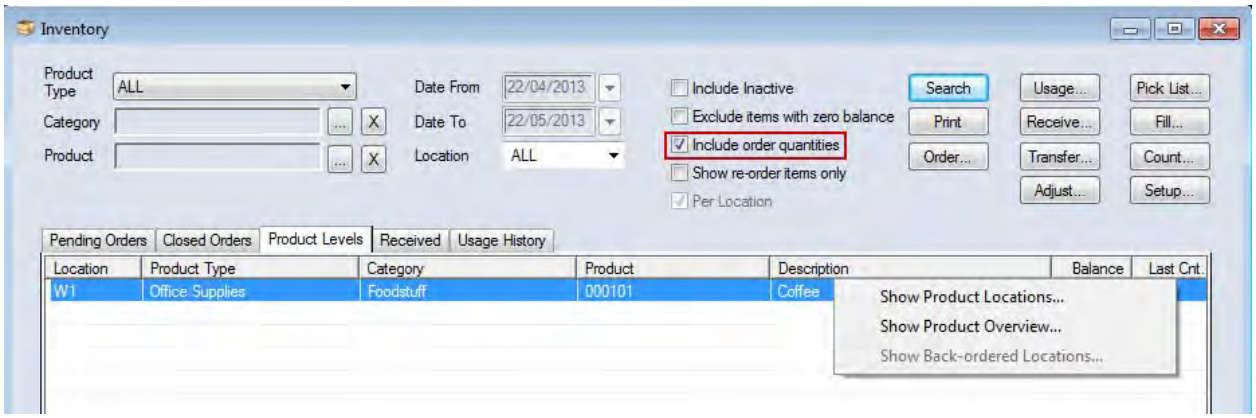


New:

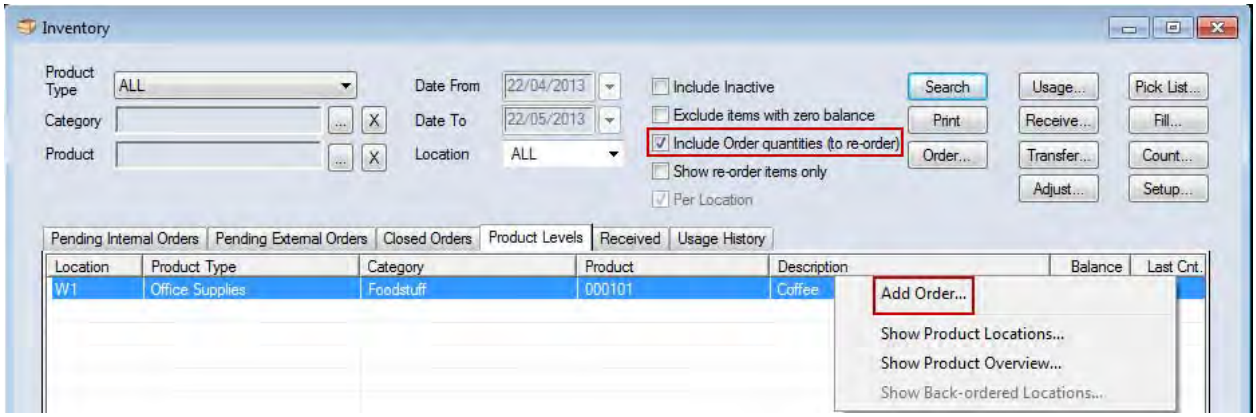


Enhancement 2: The 'Include order quantities' check box has been changed to 'Include Order quantities (to re-order).'

Current:



New:



- Selecting the 'Include Order quantities (to re-order)' check box enables the 'Add Order' right-click option.

- Selecting the 'Add Order' right-click option opens the Inventory Order window, and displays all highlighted items in the list. Information about each item is populated, including the Ordered by, Type, and From fields.

Note: These items must be for the same vendor.

Lab Tracking

32226 – Improved lab order auditing

Module: Lab Tracking ~ Lab Order History window (new)

Issue: We need the ability to better audit lab orders. The current method of printing the Lab Order Details window shows the last state of the lab order (and each of its lab items), and shows nothing about who completed the lab order, who sent the order out, who marked the order in, etc.

Enhancement: The following changes have been made:

Change 1: Improved the lab order auditing.

Usage:

1. Go to EHR window – Labs tab – highlight a record - (Show History) (new).
   axiUm displays the Lab Order History window (new).

Lab Order History

Order Details

Patient: Doe, Jane (258)
Discipline: Is Ortho
Treatment
Lab Proc: L9999 Lab Order

Open Date: 25/07/2012
Student Remake
Lab Remake
Charges Waived
Remake Order: 0

Order #: 23
Case #: 94
Order In: 22/05/2013

Order Item
Provider
Lab
Redo
Lab Item: 0
Appr. Req'd
Internal Note
Details
Approval User
Approval Date

Expected
Supplements
Supplements with Order

Costs: 0.00
Charges: 0.00
Total

Order Status	Order In/Out	Lab Item	Item Status	Redo	Appr. User	App. Date	Type	User	Date	Time
Pending Approval							Add	Admin, Axium	25/07/2012	12:00 AM
Completed							Edit	Admin, Axium	24/10/2012	06:57 AM

Use this window to view key historic details of the selected lab order, such as when the status changed, the active item changed, it went in or out, was approved or deleted.

2. For more detailed history information, from the list view, highlight a record and select the Show Full History right-click option (new). This will display all history lines for the lab order (including things such as note modifications and a change to discipline.

Order Status	Order In/Out	Lab Item	Item Status	Redo	Appr. User	App. Date	Type	User	Date	Time
Pending Approval							Add	Admin, Axium	25/07/2012	12:00 AM
Completed							Edit	Admin, Axium	24/10/2012	06:57 AM

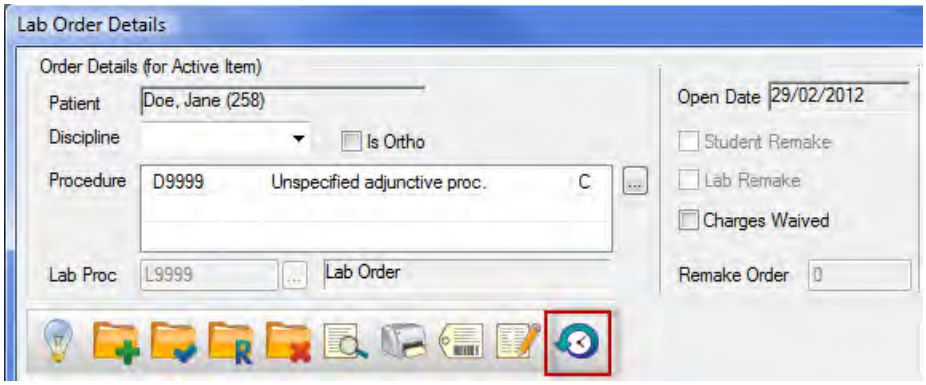
Show Full History

axiUm displays additional records. This list view now displays all lab order entries for the selected lab order.

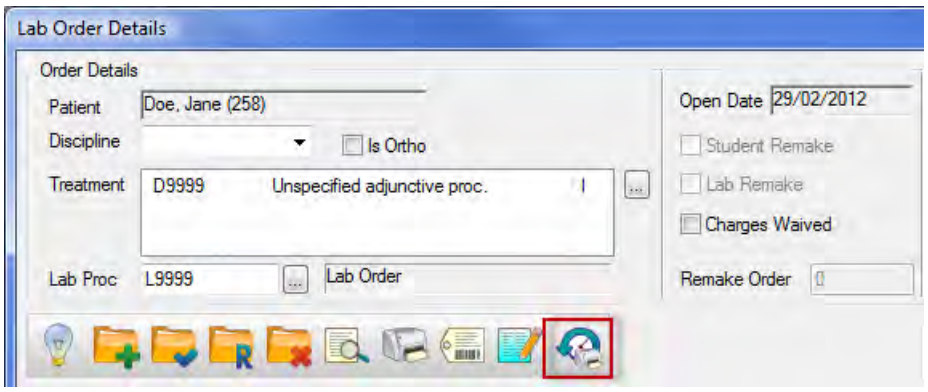
Order Status	Order In/Out	Lab Item	Item Status	Redo	Appr. User	App. Date	Type	User	Date	Time
Pending Approval							Add	Admin, Axium	25/07/2012	12:00 AM
Completed							Edit	Admin, Axium	24/10/2012	06:57 AM
Completed							Edit	Admin, Axium	24/10/2012	07:23 AM

Change 2: The Lab Order Details window's Show History icon has been changed to indicate that it shows the Lab Order Printout History.

Current:



New:



Change 3: Added new fields in the Info Manager module.

When you go to Info Manager window – Clinic Mgmt tab – Lab Tracking Order category – list view – Edit Report right-click option - Report Definition window – Files section, the following files are new:

- Lab Order Audit
- Audit Lab Order Station Info

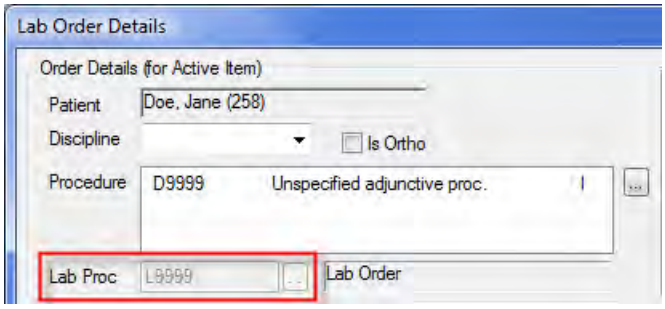
- Audit Lab Order User Info
- Lab Item Audit
- Audit Lab Item Station Info
- Audit Lab Item User Info

  Note: The Lab Item Audit User Name item and the Lab Item Audit User First item indicate the user who made the changes to the lab item.

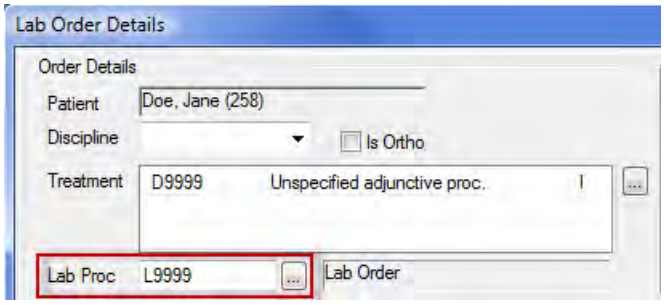
60915 – Ability to edit the Lab Proc field

Module: Lab Tracking ~ Lab Order Details window

Issue: If you are viewing a lab order, and you want to change the associated lab procedure code before sending it out to the lab, you must delete the original request and create a new one. Need the ability to edit this field.



Enhancement: Now if the lab order is in-process, the Lab Proc field is enabled. If the lab order is completed or closed, the Lab Proc field will continue to be disabled.



When you change this field and click (Modify Record), axiUm displays the message, “Attempting to change the Lab Procedure for in Progress Lab Order. Are you sure you want to continue?” Clicking the Yes button saves the changes.

You can prevent users from updating the lab procedure by disabling the Yes button in the PowerAdmin module.

The Lab Proc field is now also enabled in the following windows:

- Lab Order details (Order Out)
- Lab Order details (Order In)

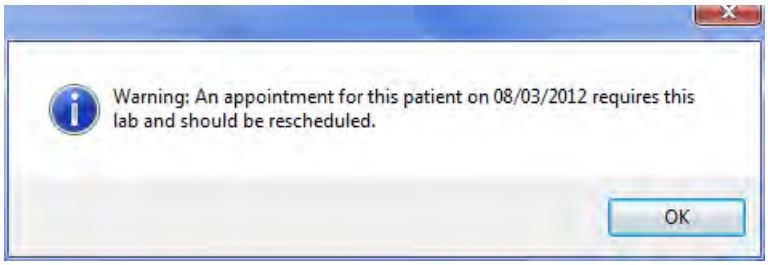
80669 – Changing lab date displays warning message

Module: Lab Tracking ~ Lab Order Details window

Issue: If you change the expected date on a lab order, and the patient is booked for an appointment earlier than this date, the appointment will occur before the lab order is ready. Need axiUm to prevent you from creating this conflict.

Enhancement: Now if you go to the Lab Order Details window's Expected field and change the date to one that is earlier than the patient's appointment date, axiUm displays an error message.

For example: If the lab order was originally expected to be ready on August 1, and you changed this date to August 10, and the patient is booked for an appointment (associated to this lab order) on August 3, axiUm displays the message, "Warning: An appointment for this patient on 08/03/2012 requires this lab and should be rescheduled."



82948 – Ability to disable auto-completing of lab orders

Module: Lab Tracking

Issue: When you complete a lab treatment associated to a lab order, axiUm auto-completes the associated lab order, and this is fine. However, once a lab order is completed, you cannot enter the costs and charges. Need the ability to disable the auto-complete function so that completing the lab treatment skips auto-completing the associated lab order.

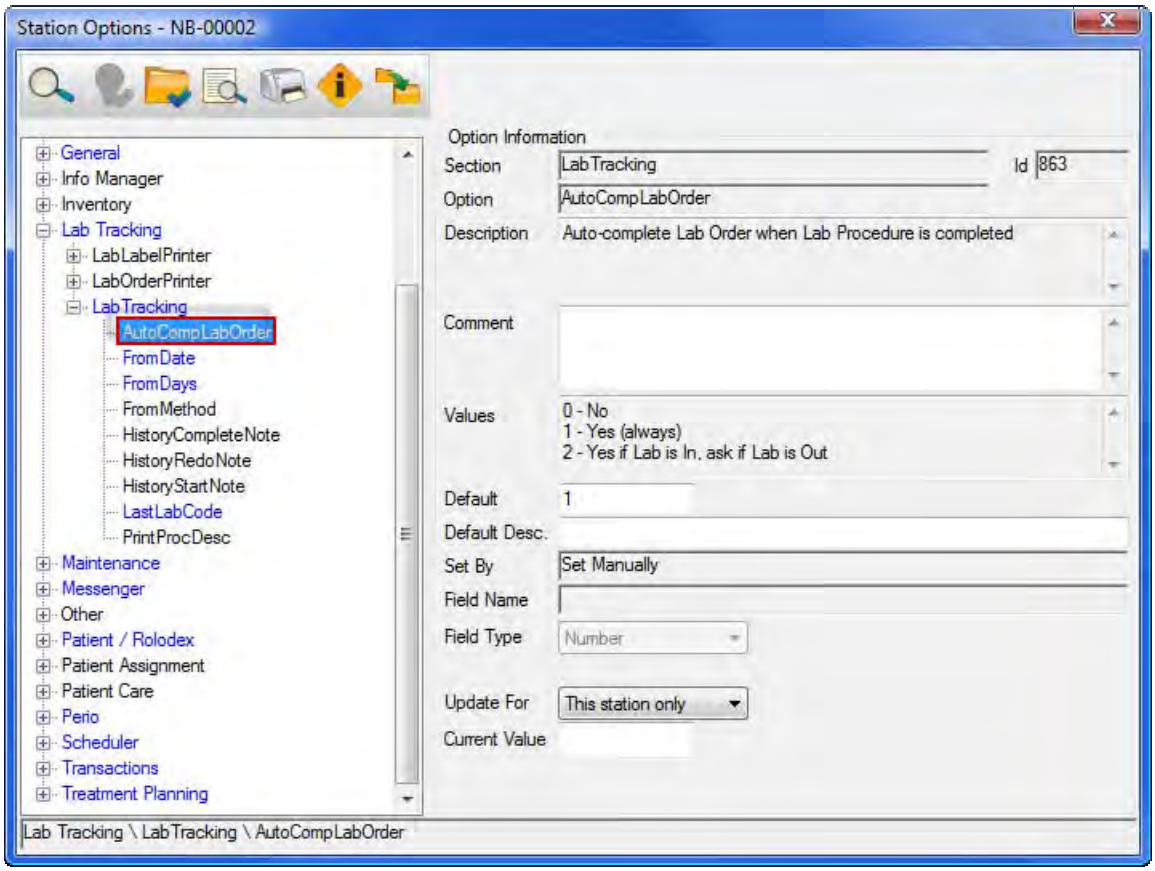
Enhancement: Now has the ability to disable the auto-complete function so that completing the lab treatment does not automatically complete the associated lab order.

Setup:

1. Open the Station Options window.

   Go to the Maintenance window - System tab - Stations icon – Station Codes window - (Station Options).

2. Go to Lab Tracking section – Lab Tracking section – AutoCompLabOrder item (new).



3. In the Current Value field, enter one of the following:
   - 0 - No: When you complete a lab procedure, axiUm does not auto-complete the associated lab order.
   - 1 - Yes (always): This retains the original behavior. When you complete a lab procedure, axiUm auto-completes the associated lab order.
   - 2 - Yes if Lab is In, ask if Lab is Out: When you complete a lab procedure, and the lab order has arrived, axiUm auto-completes the associated lab order. If the lab order has not yet arrived, axiUm asks, “The Lab is marked as Out. Do you want to complete the Lab Order and mark the Lab as In?” Clicking the Yes button completes the associated lab order.

100164 - Remaking lab now retains lab form

Module: Lab Tracking ~ Lab Order Details window

Issue: When you remake a lab order, axiUm closes the original order and creates a new one, and this is fine. However, axiUm does not transfer any EPR forms from the original lab order to the new one. Need the ability to retain the original EPR form when you remake a lab order.

Enhancement: Now when you remake a lab order, axiUm attaches a copy of the original EPR form. When you open the Lab Order Details window to display the details of the remake, the original EPR form is attached.

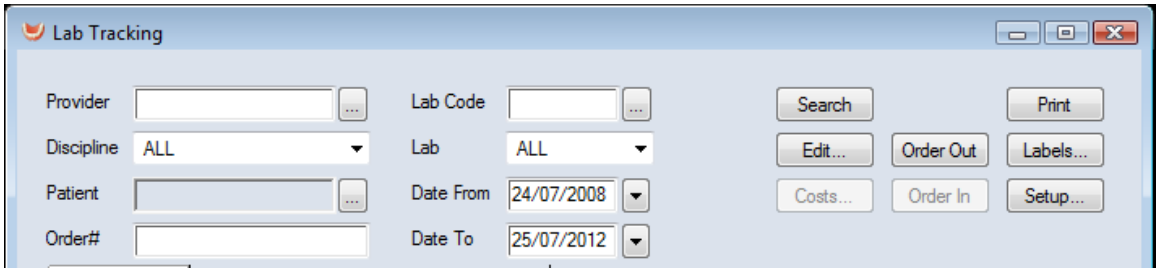
101029 - Improved method for clearing patient from search criteria

Module: Lab Tracking

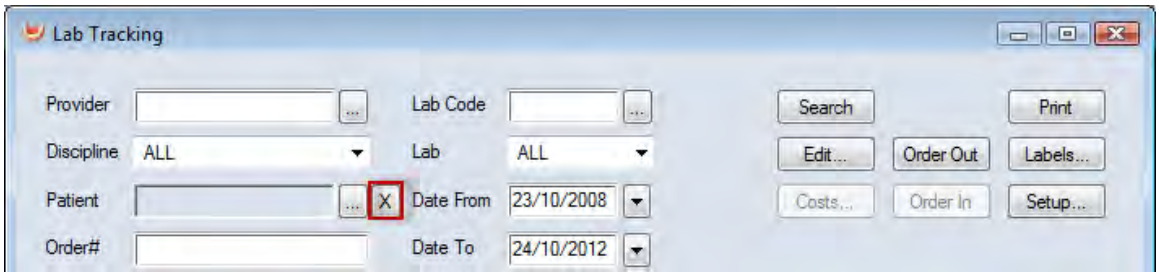
Issue: Currently, if you want to clear the Patient field, you must click ... (ellipsis) to open the Rolodex (Select Patient) window and then immediately close this window. Need an easier method to clear this field.

Enhancement: The Lab Tracking window's Patient field now displays X (delete) (new). Clicking this button clears the field.

Before:



After:

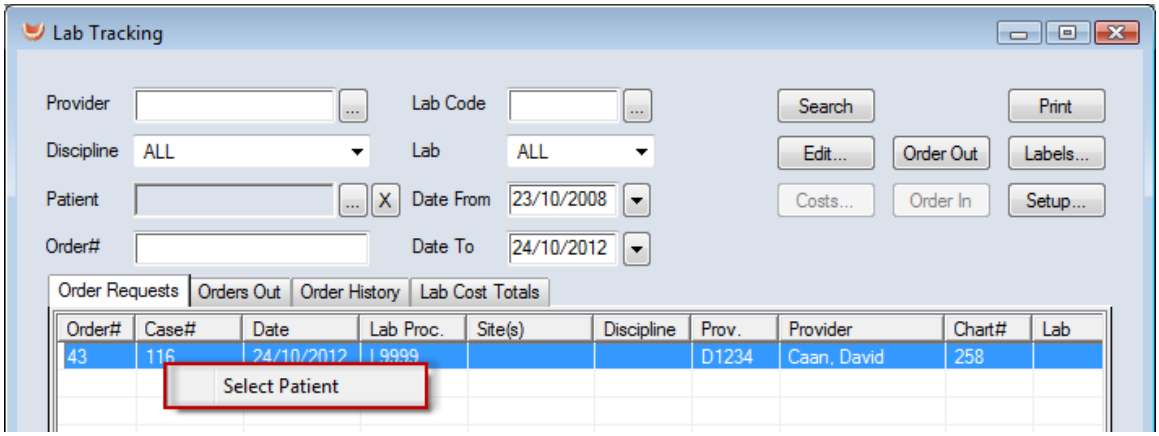


101031 - New Select patient right-click option

Module: Lab Tracking - Order Requests tab, Orders Out tab, Order History tab

Issue: Currently, if you want the patient in the selected lab order to be the active patient, you must open the lab order record to see the patient's name and then open the Rolodex window to search for this patient, and then select this patient as the active patient. Need an easier way to do this.

Enhancement: Now the Order Requests tab, Orders Out tab, and Order History tab displays the **Select patient** right-click option (new). Selecting this option makes the patient associated to the selected lab order the active patient, and displays the patient's name on the status bar.



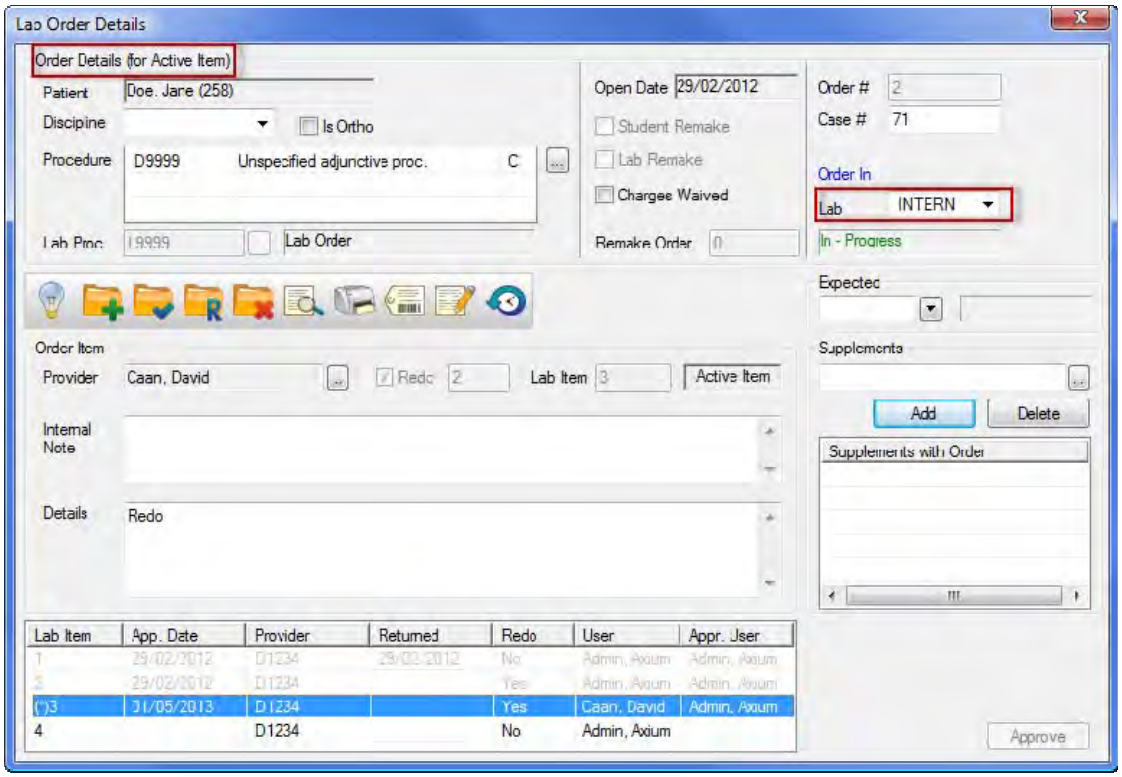
123616 – Allow each lab item to have a different lab selected

Module: Lab Tracking

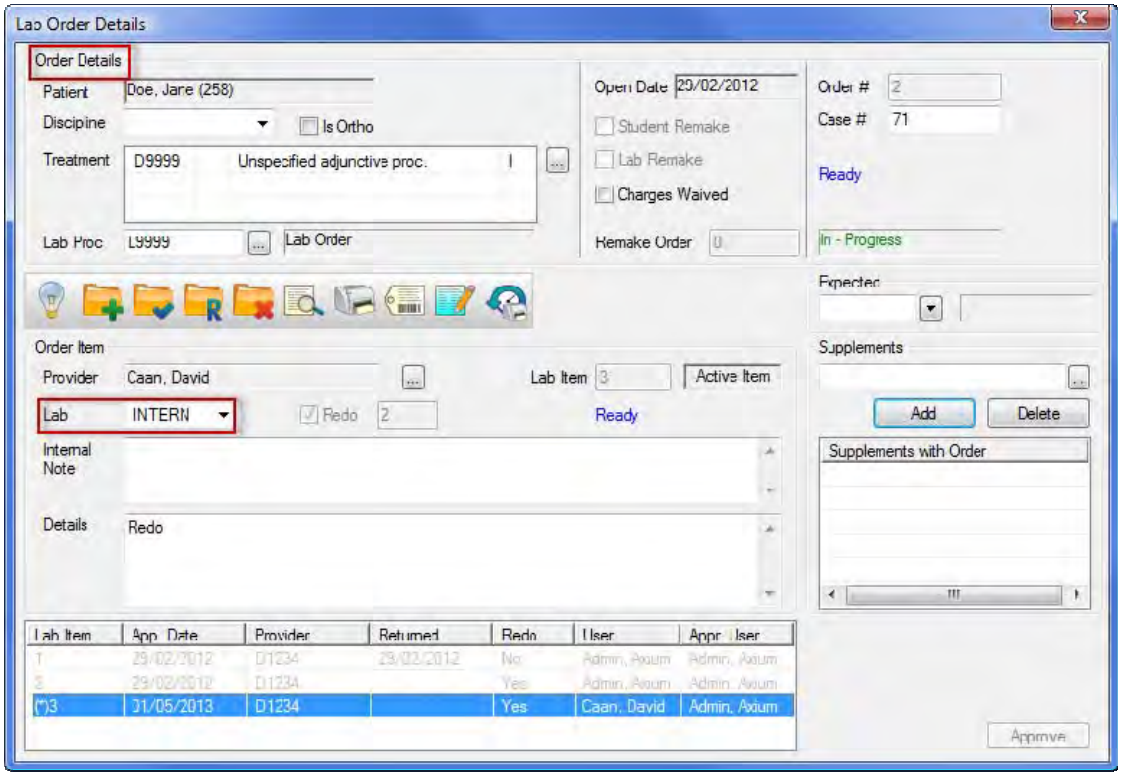
Issue: If you enter multiple lab items in a single lab order, and for one of these lab items you change its lab location, it appears that all items shown in this lab order are now set to the same location. Need the ability to associate different lab locations to different lab items.

Enhancement: Now you can select a lab location for each lab item.

Current:



New:



Notes:

- The **Order Details (for Active item)** section has been renamed the **Order Details** section (changed).
- The Lab drop-down field has been moved from the right side of the Lab Order Details window to the Order Item section (changed). This is because the lab location is no longer associated to the entire order but to the specific lab item highlighted in the list view.

124183 – Ability to reverse a completed lab

Module: Lab Tracking

Issue: Once the order is completed it is considered successfully finished, and therefore you cannot remake it. Need the ability to remake completed lab orders.

Enhancement: Now you can re-open a previously completed lab order.

Usage:

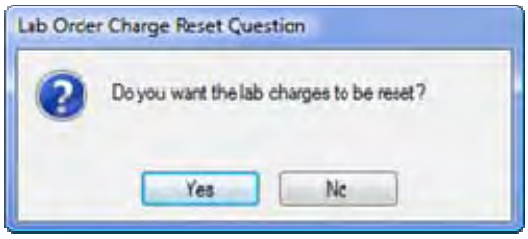
1. Go to the EHR window's Labs tab.
2. From the list view, highlight a completed lab record.
3. Right-click to display a list of options and select Re-Open option (new).

   axiUm displays the Re-open Lab Order Warning window with one of the following messages:

   - This message displays if the lab contains additional charges and the associated treatment has also been completed:

- This message displays if the lab contains no additional charges:

4. Click the Yes button.



5. Click one of the following buttons:

   - Yes: If there were lab charges for the original lab order, the Total Charges field on the Lab Order Details window in the Lab Tracking module resets to $0. However, if you also click the Charges button to display the Lab Order Charge window, axiUm still displays the Total Charges field. To accept that these charges are still valid, click the OK button. If these charges are no longer valid, clear them and click the OK button.

     No: If there were lab charges for the original lab order, the Total Charges field on the Lab Order Details window in the Lab Tracking module retains the original amount.

6. Now that the lab order has been re-opened, axiUm changes the record's status from Completed to In-Progress and the Sts (Status) column changes from C to I. Now, from the EHR window's Labs tab, you can edit the lab order details as though the lab order was never completed; including adding a new lab item, modifying the lab procedure, etc. When editing this lab order from the Lab Tracking module, you are also able to edit details such as the costs, weight, charges, etc.

67909 – Product list: search based on partial product string

Module: Maintenance ~ Inventory Products List window, Vendors List window

Issue: Users want to be able to quickly search on a portion of the product's description.

Enhancement: When searching for a product, a partial match will of the product description will display results. There is no need to use the % symbol in the search criteria to do partial matching. This change has also been made to the Vendor searching in the Vendors List window.

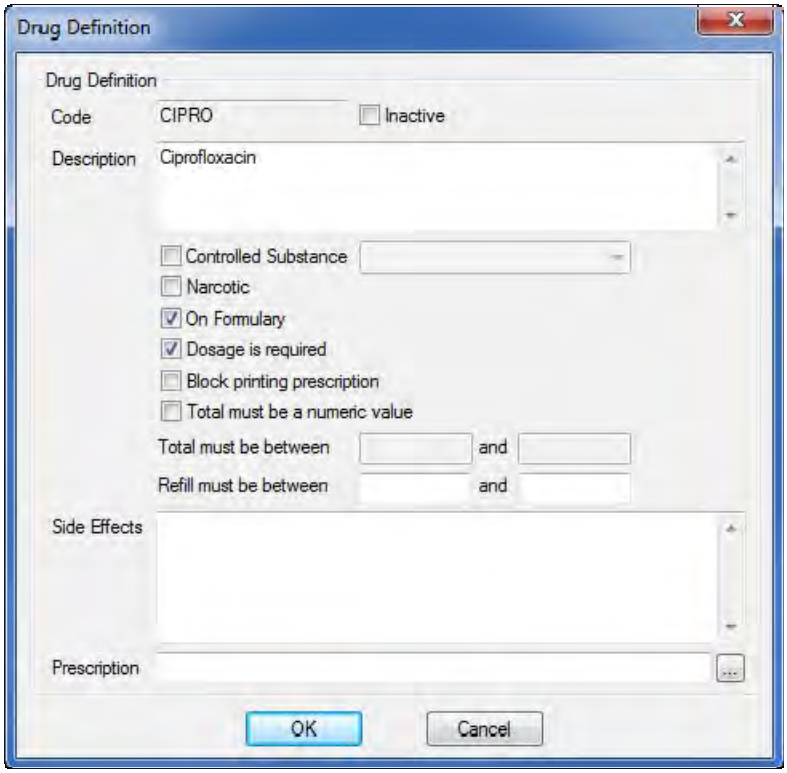
104191 – Drug Definitions: Need a way to prevent refills when prescribing certain drugs

Module: Maintenance ~ Drug Definition window

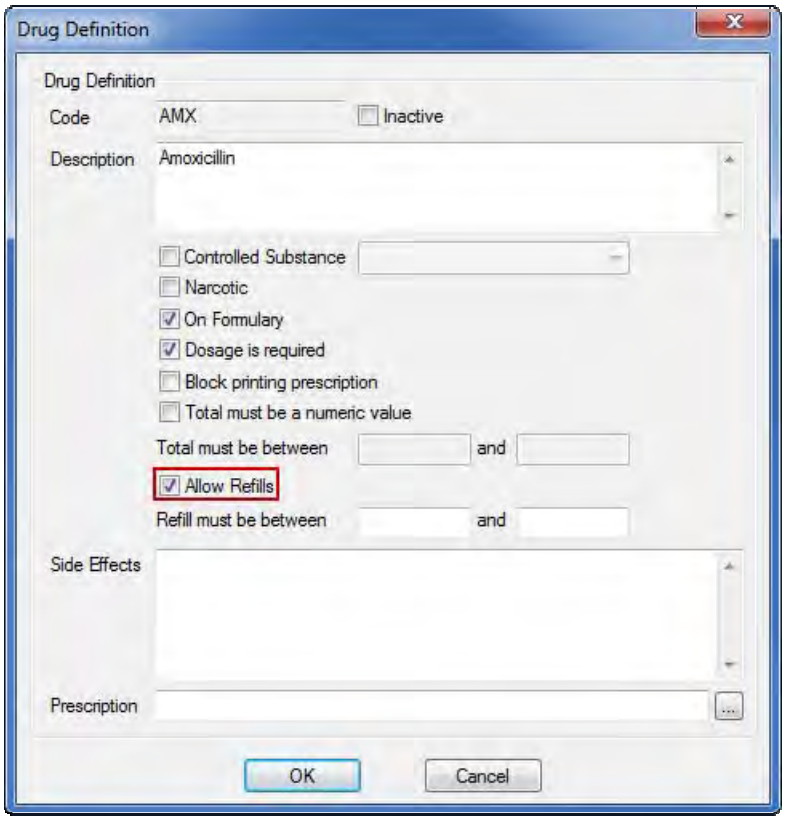
Issue: Unable to indicate that refills are not allowed when prescribing certain drugs.

Enhancement: In the Drug Definitions window (Maintenance – EHR tab – Drug Definitions icon – Drug Definition List window), there is now an 'Allow Refills' check box. When adding a drug which does not allow refills, the Refills allowable range fields are disabled. When the user is adding a prescription for the drug, the Refills field will be disabled.

Current:



New:



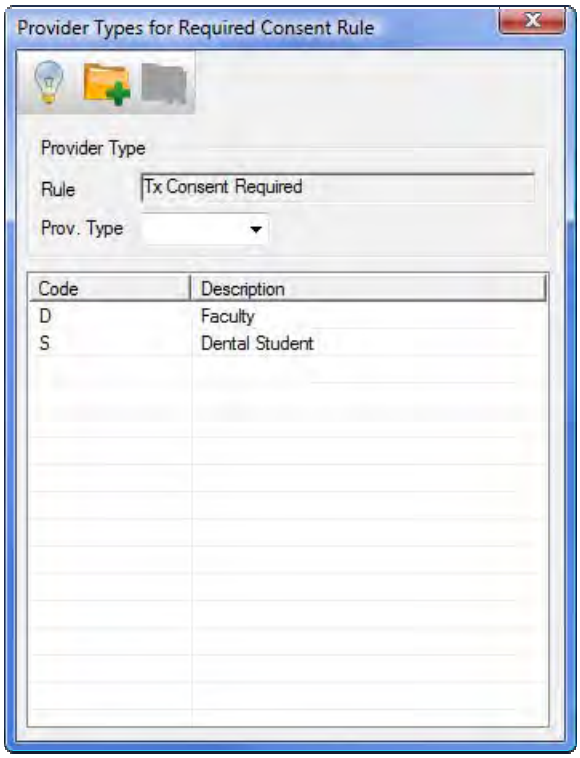
130226 – Ability to multi-select provider type records

Module: Maintenance ~ Provider Types for Required Consent Rule window

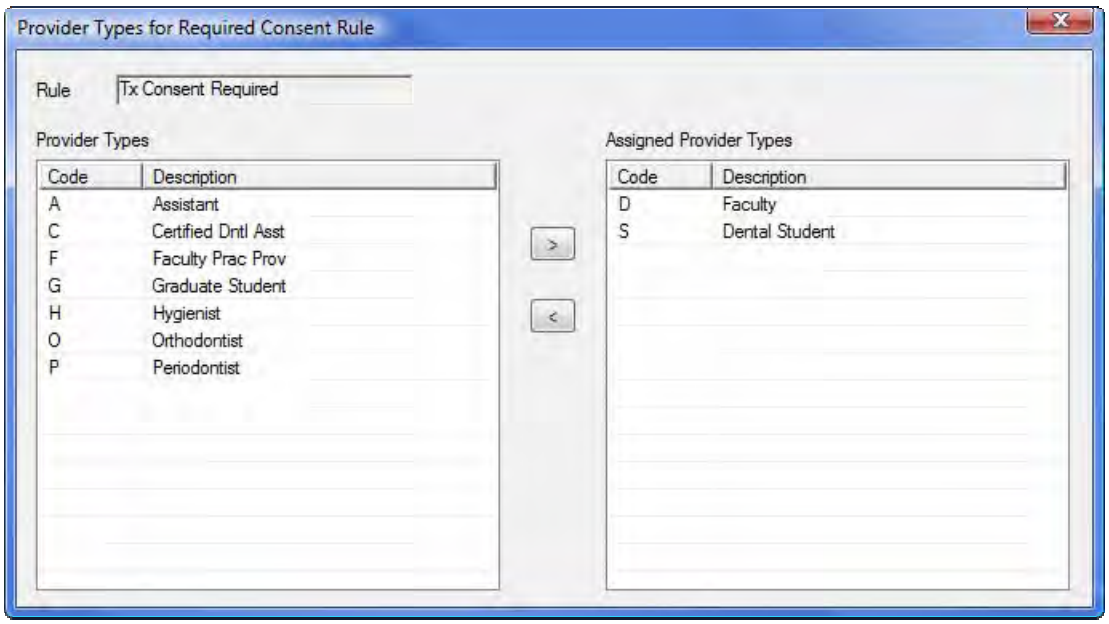
Issue: In the Provider Types for Required Consent Rule window (in Maintenance window – EHR tab – Required Consent Rules icon – Required Consent Rules window – Provider Types button), you cannot multi-select provider types. Need the ability to do this.

Enhancement: You can now multi-select provider types. The Provider Types for Required Consent Rules window (changed) now displays the Provider Types list view (left panel) showing available records you can select, and also the Assigned Provider Types list view (right panel) displaying records already selected.

Current:



New:



130710 - Copying provider schedule can now copy same chairs

Module: Maintenance ~ Copy Provider Work Schedule window

Issue: In the Copy Provider Work Schedule window (in Maintenance window - Scheduler tab - Provider Schedules icon - Provider Working Schedules window - (Copy Schedules)), need the ability to copy the same chairs into the new work schedule.

Enhancement: Now when you copy a schedule to the same provider, axiUm asks, “This provider has specific chairs assigned. Do you want to keep the assigned chairs in the new schedule copied to?”

- Yes: axiUm assigns the same chairs.
- No: axiUm assigns chairs by availability.

Also, when you copy a schedule to a different provider (who has a default chair applicable to the work schedule), axiUm asks whether you want to use that chair.

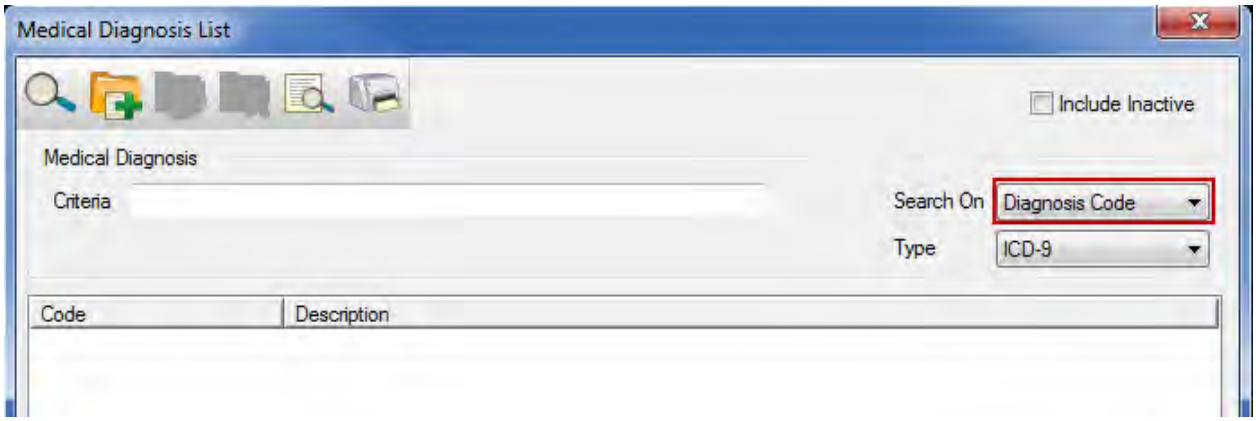
131728 – Medical Diagnosis codes: Search on both Description and Code

Module: Maintenance ~ Medical Diagnosis List window

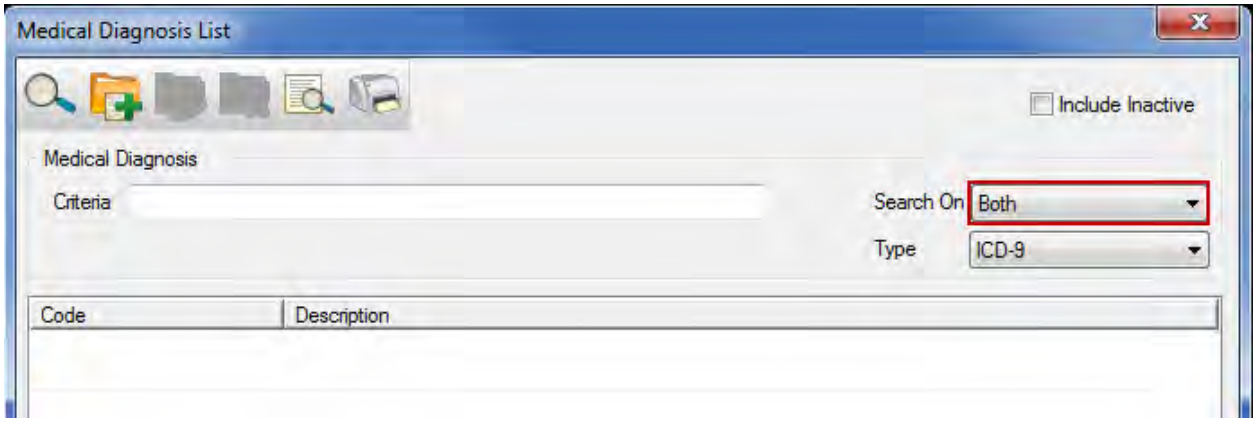
Issue: Users are not familiar with medical diagnosis codes and they prefer to search based on descriptions instead.

Enhancement: In the Medical Diagnosis List window (Maintenance – Clinical tab – Medical Diagnosis List window), there is a new search option called ‘Both,’ which searches on both descriptions and codes at the same time. Users can enter search criteria without selecting Diagnosis Code or Diagnosis Description. The default when searching is ‘Both’ so the user can quickly search by either Code or Description.

Current:



New:



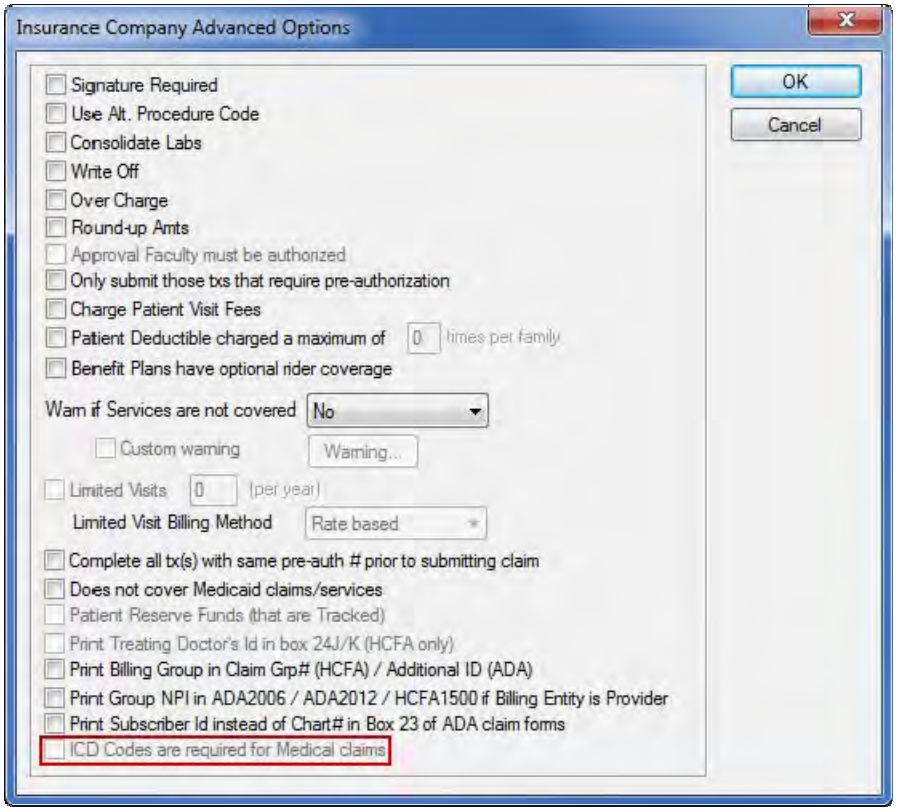
131770 – Make “ICD Codes are required” available for Dental Insurance

Module: Maintenance window ~ Insurance Company Advanced Options window

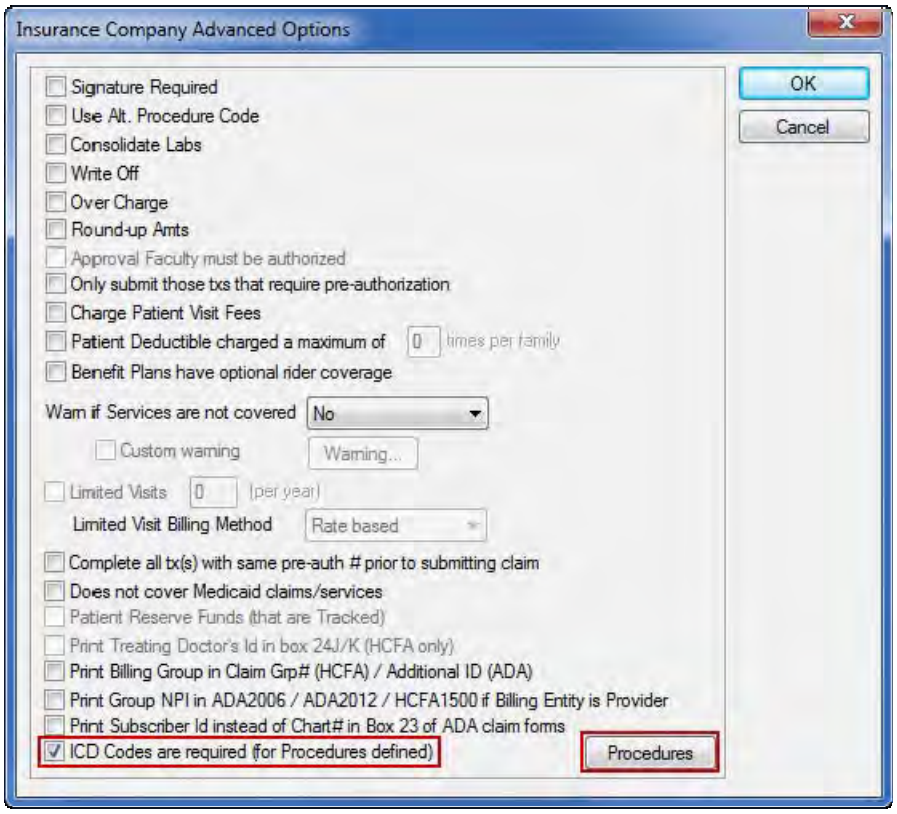
Issue: As insurance companies are beginning to require medical diagnosis information on dental claim forms, users would like to indicate that ICD codes are required for some procedure codes.

Enhancement: Insurance Companies Advanced Options (Maintenance – Insurance tab – Insurance Companies icon – Insurance Companies List window – Insurance window – Advanced button), users can set ICD Codes are required (for Procedures defined) for dental insurance companies, and select specific procedures by clicking the Procedures button. When a procedure is completed in the EHR, the Tx Service Information dialog will pop up (same as medical claims), to allow for the entry of ICD codes. If a default was set based on the Clinical Diagnosis Code, it will appear here. The ICD codes for dental claims will be included in the 5010 EDI format, as well as on the ADA2012 form in section 32a. On the ADA 2006 form, this information will be included in the comments section.

Current:

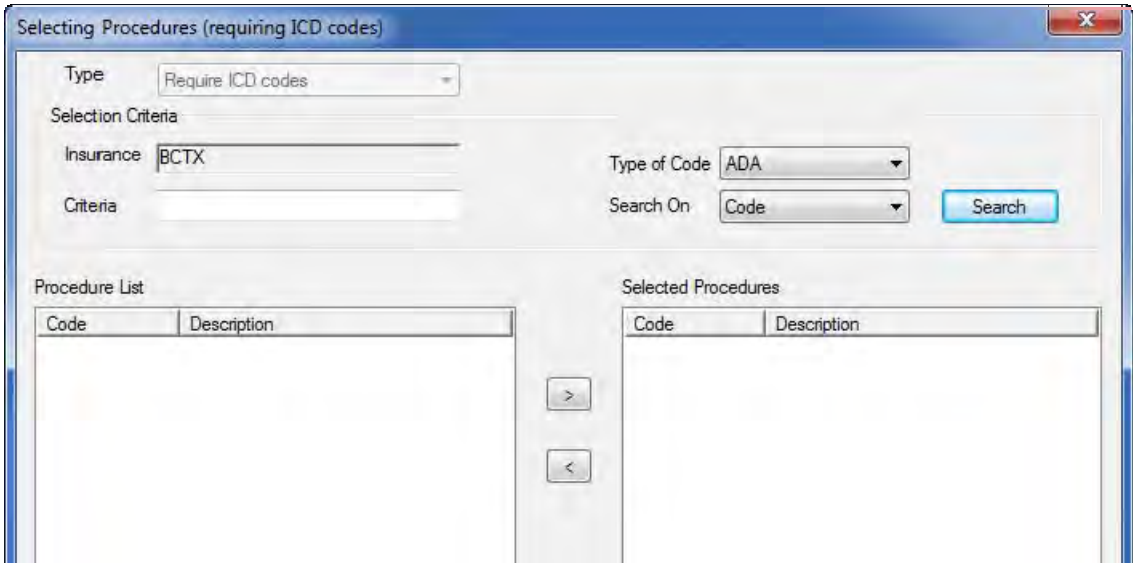


New:



1. Select the ICD Codes are required (for Procedures defined) check box.

2. Click the Procedures button.
   axiUm displays the Selecting Procedures (requiring ICD codes) window (new).



3. Click the Search button.

4. From the left list view, highlight a record.

5. Click (right arrow) to move the record to the right list view.

6. Click (Close).

131778 – Ability to add medical information in dental claims

Module: Maintenance ~ Station Options window

Issue: Previously, dental claim forms required no diagnosis codes. However, with the introduction of 5010 claim forms and ADA 2012 claim forms, some insurance companies (e.g. Medicaid) require certain medical information (e.g. diagnosis codes) to show on these dental claim forms. Need the ability to create dental claims that contain medical diagnosis information.

Enhancement: Now axiUm has the ability to create dental claims that contain medical diagnosis information. There are two enhancements:

Enhancement 1: Changed the names of various screen elements in axiUm:

- In the Procedure Code window (in Maintenance window – Clinical tab – Procedure Codes icon – Procedure Codes List window – highlight a CPT record – (Edit Record)), the Medical button has been renamed the Service Info button (changed).

- In the Transactions window's Treatment tab, the Medical button is no longer displayed (deprecated). Instead, there is a Tx Service Medical Information right-click option (new).

- The Tx Medical Information right-click option is now called the Tx Service Medical Information right-click option (changed). Selecting this right-click option used to display the Tx Medical Information window. This window has been renamed to the Tx Service Information window (changed).

- Any warnings, errors, or message boxes containing the term "Medical Information" now displays the term "Service Information".

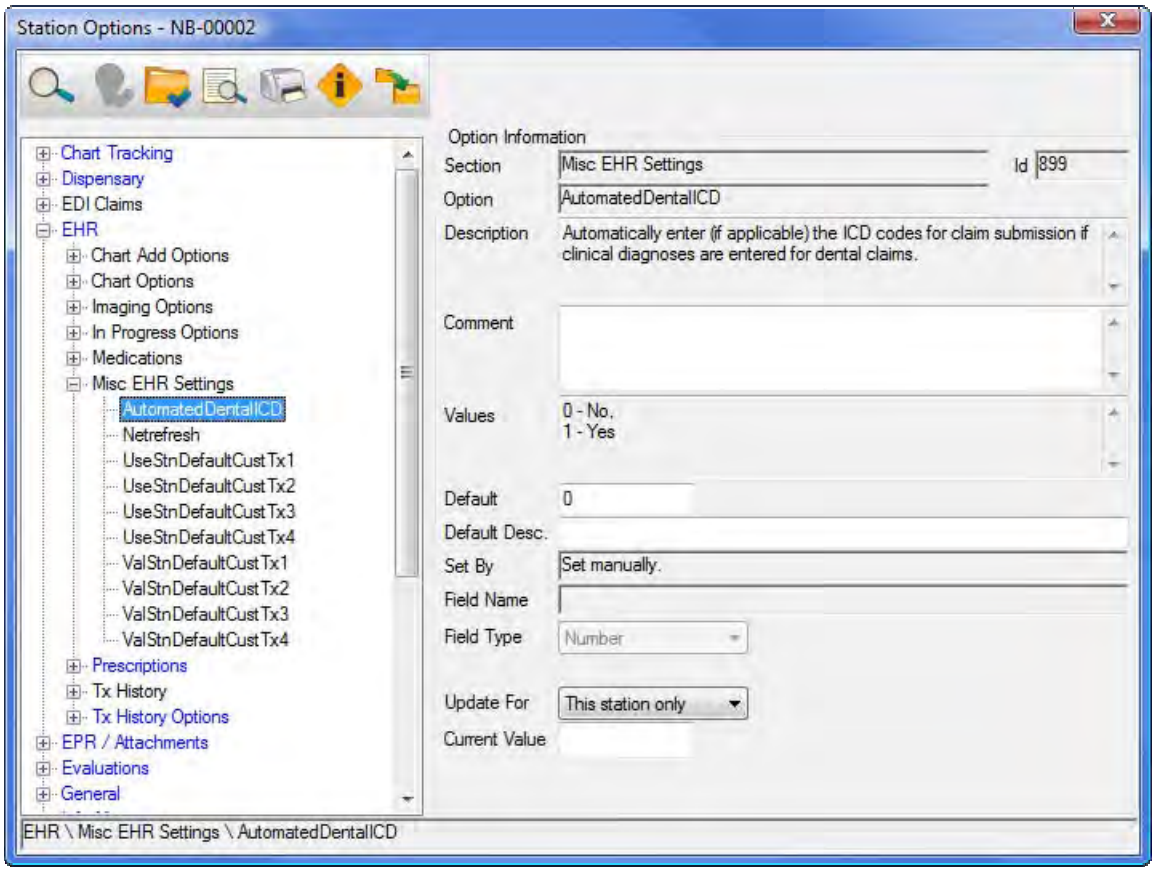
Enhancement 2: A new station option is available to auto-populate ICD codes on dental claims.

Setup:

1. Open the Station Options window.

   Go to the Maintenance module - System tab - Stations icon – Station Codes window - (Station Options).

2. Go to EHR section – Misc EHR Settings section - AutomatedDentalICD item (new).



3. In the Current Value field, enter one of the following options:

   - 0 – No: This retains the current behavior.

     You can still manually add ICD information by going to the EHR module or the Transactions module, highlighting a record in the list view, and selecting the Tx Medical Information right-click option.

     Note: If the dental insurance company uses 5010 EDI or the ADA 2012 paper claim form, axiUm includes this diagnosis information.

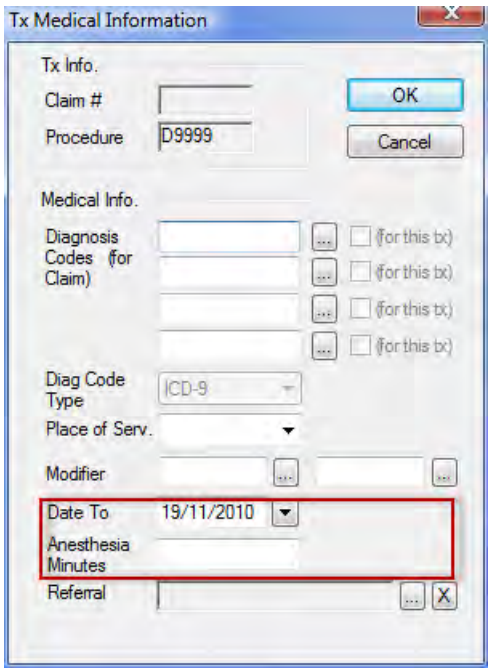
   - 1 – Yes: Automatically enter (if applicable) the ICD codes for claim submission if clinical diagnoses are entered for dental claims.

     If you select clinical diagnosis codes that are mapped to ICD codes (mapping is done in Maintenance window - Clinical tab - Clinical Diagnosis Codes icon – Clinical Diagnosis List window – run a search - (Edit Record) - Clinical Diagnosis Codes window), axiUm automatically adds the mapped ICD codes on the claim form.

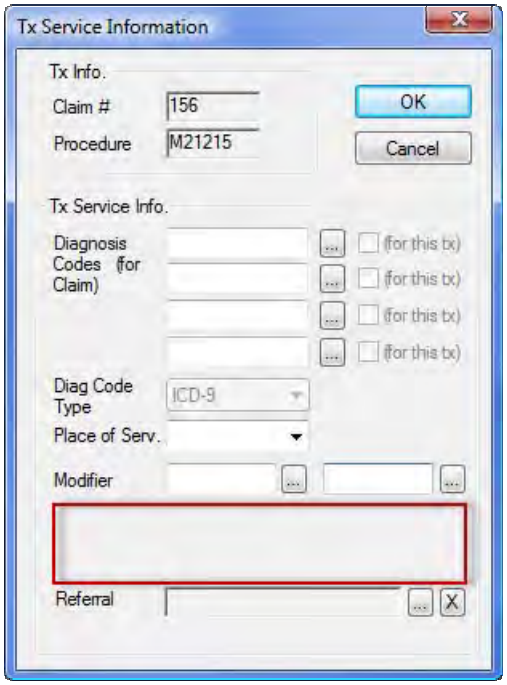
     Note: Use this option only if clinical diagnosis codes have been mapped very carefully.

Note: When you go to the Tx Medical Information window to enter medical-type information, axiUm hides those fields that do not apply to dental claims (i.e. the Date To field and the Anesthesia Minutes field).

Medical treatments:



Dental treatments:



132479 – Physician: Email information

Module: Maintenance ~ Physicians List window

Issue: Providers need the ability to send correspondence or various reports to a patient's physician via e-mail. There is currently no option to enter a physician's e-mail address into axiUm.

Enhancement: The Physician's record now contains an e-mail address, which can be accessed from the Patient>Clinical tab>Patient Physician ellipsis, and Info Manager for use in reports and letters. There is a new 'Details' button in the patient's physician and referral areas of the Patient Card. The Details buttons open the corresponding physician and referral records for the selected physician or referral.

Current:

Physician

Physician

Last Name/Clinic: Harrison
First Name/Contact: Robert
Middle Name:
Address: 2145 North Park
City: Mableton
State: GA
Zip: 30126
County: Cobb
Phone: 770 854-2136
Fax:
Type:

Comment

OK
Cancel

New:

Physician

Physician

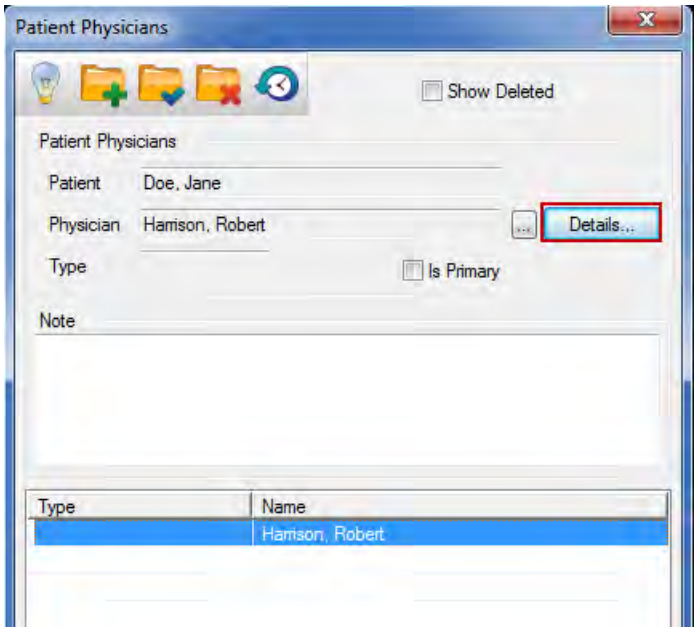
Last Name/Clinic: Harrison
First Name/Contact: Robert
Middle Name:
Address: 2145 North Park
City: Mableton
State: GA
Zip: 30126
County: Cobb
Phone: 770 854-2136
Fax:
Type:
Email: drharrison@southernmedical.com

Comment

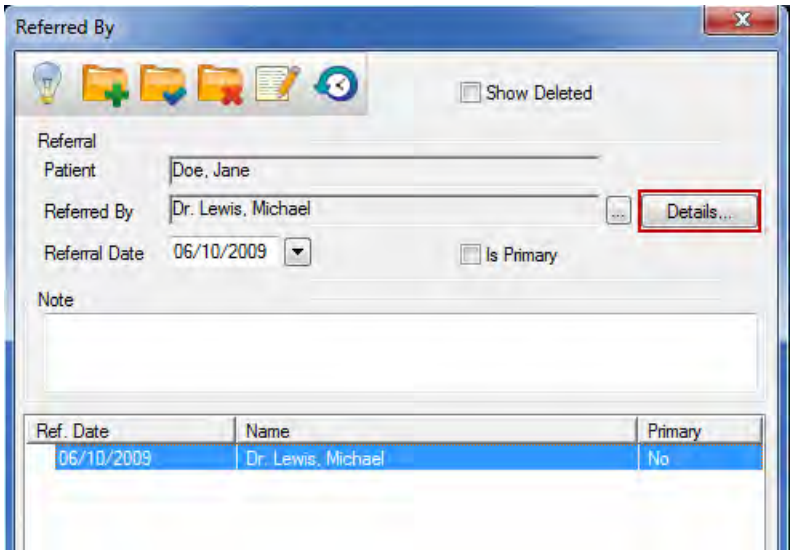
OK
Cancel

The Details button has been added to the following:

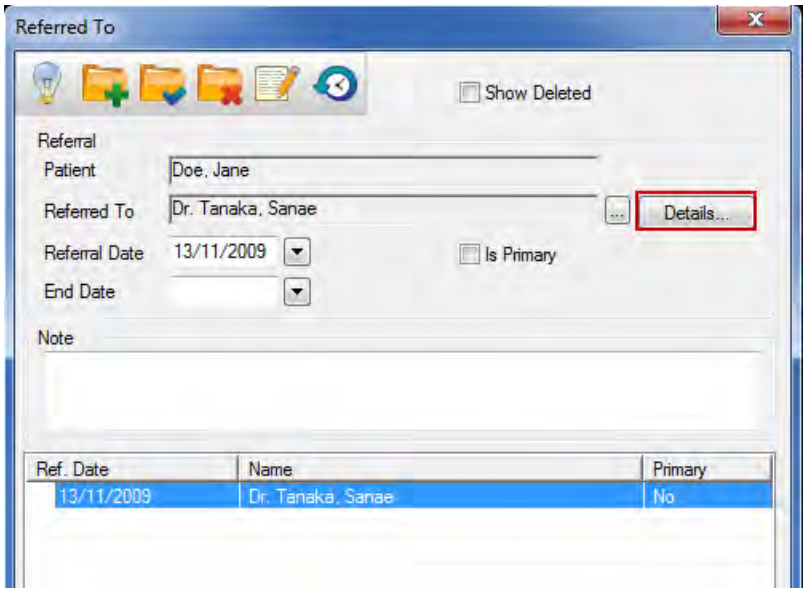
Patient Physicians window:



Referred By window:



Referred To window:



Info Manager

- Patients tab – Patient List category – Edit Report right-click option - Physician – Dr. Email (new).
- Patients tab – Student Check In/Out category – Edit Report right-click option - Physician – Dr. Email (new).
- Patients tab – Provider's List category – Edit Report right-click option - Physician – Dr. Email (new).
- Management tab – Patient Physician History category – Edit Report right-click option - Physician – Dr. Email (new).

Note: Dr_Email option is available for Microsoft Word mail merge letters.

Messenger

129605 – Patient and provider messaging through PatientAccess

Module: Messenger

Issue: Ability to send and receive patient messages within axiUm.

Enhancement: axiUm users will now be able to send messages to patients that they have access to in axiUm. The exception is when a message is cc'd or bcc'd, access is granted to the other user. Patients will see these messages when logged into PatientAccess. New messages are encrypted and satisfy HIPAA requirements. Unencrypted messages show in axiUm and on Crystal reports. In Messenger, patient messages will be shown in green text, so they are easily identified.

Setup:

1. Open the Internet Access window.

   Go to the Patient Card – Patient Info window – Internet Access button.

2. Select the **Can send messages** check box.

3. Click the Save button.

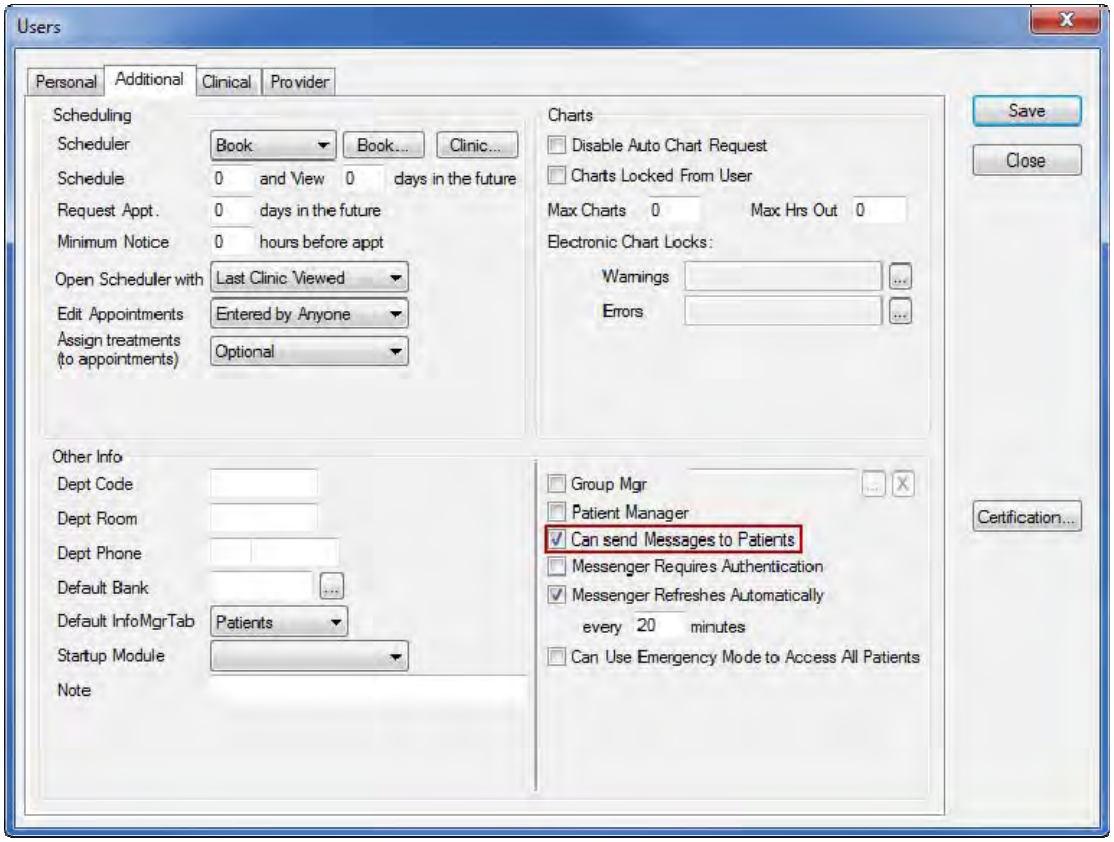
4. Click (Close).

5. Click the Close button.

6. Open the Users window.

   Go to the Maintenance window – Office tab – Users icon – double-click user record - Additional tab.

7. Select the **Can send Messages to Patients** check box (new).



8. Click the Save button.

9. Click the No button.

10. Click the Close button.

Usage:

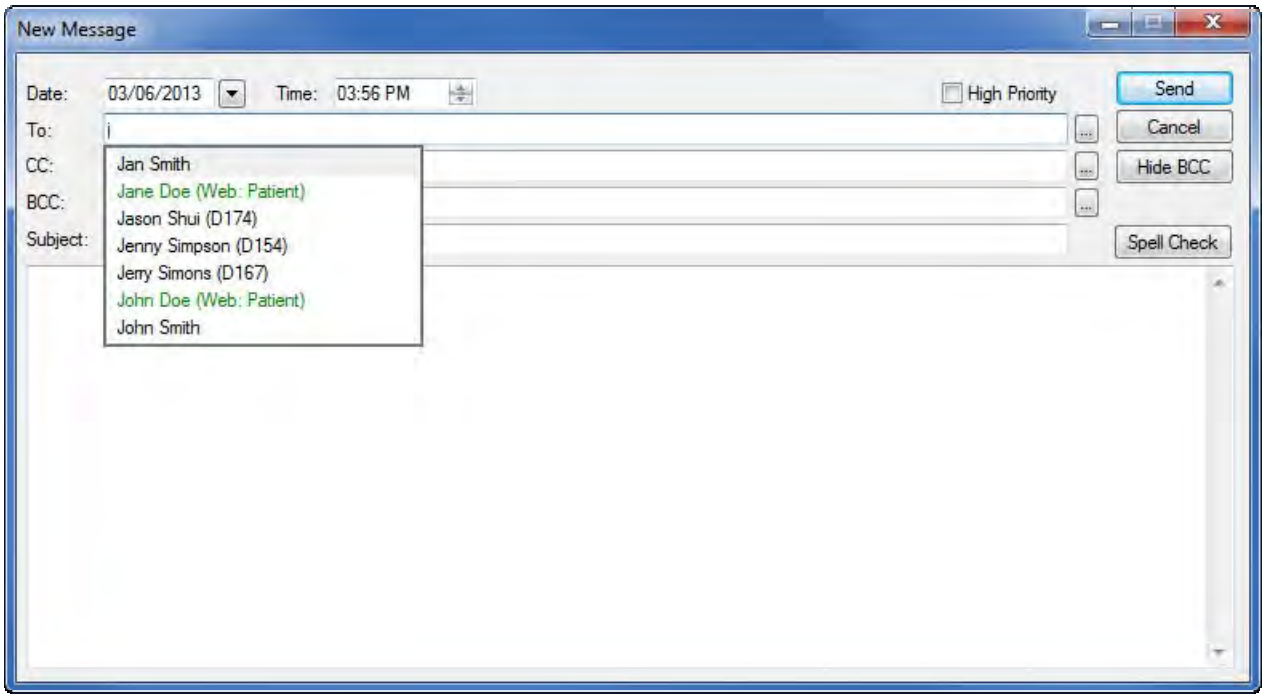
1. Open the New Message window.

   Messenger window –  (New Message)

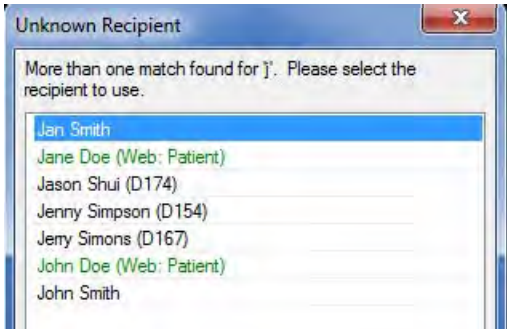
2. Enter the first letter or letters of the patient's name.

   Intelli-sense is used to show the list of recipients.

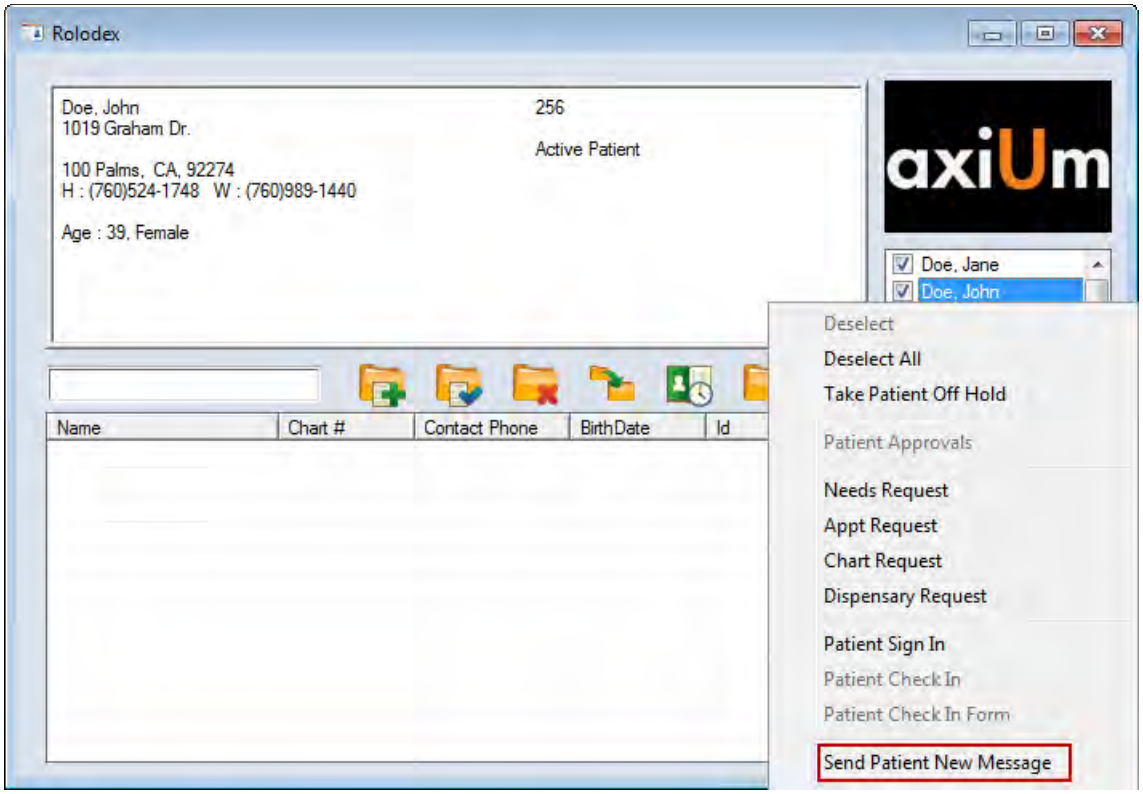
   axiUm displays the patient's name in green text with 'Web: Patient' in parentheses.



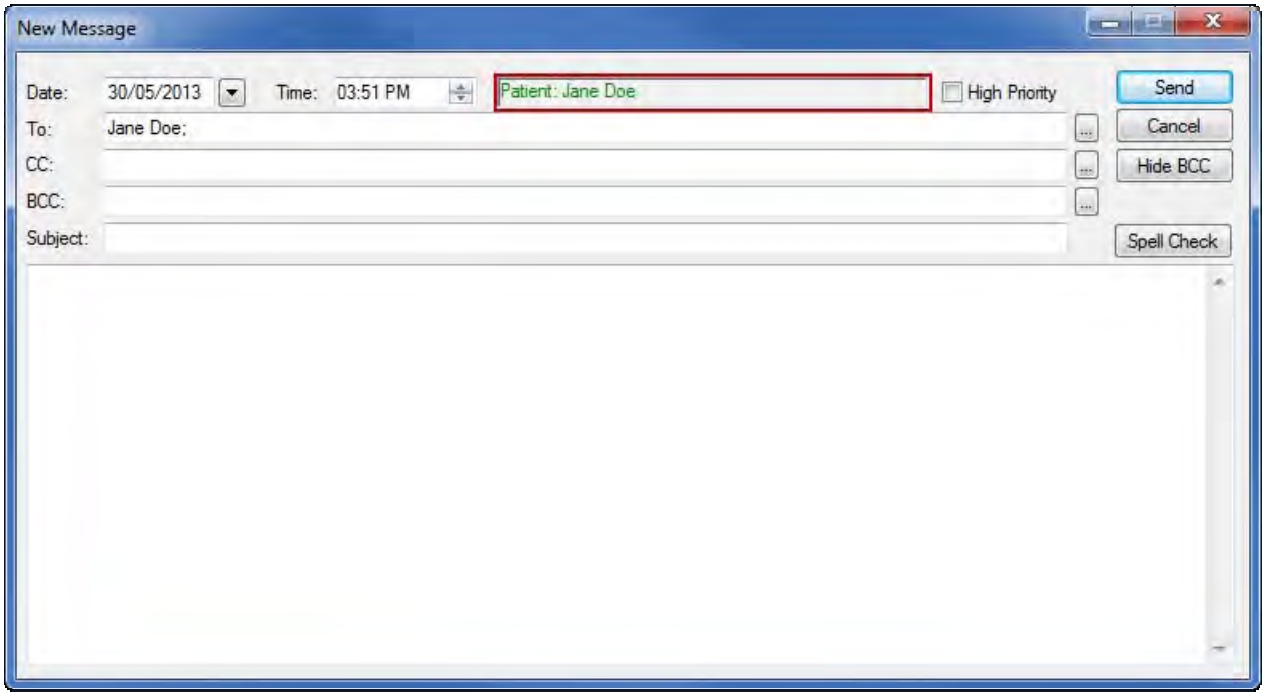
Patient names also display in green text with 'Web: Patient' in parentheses in the Unknown Recipient window.



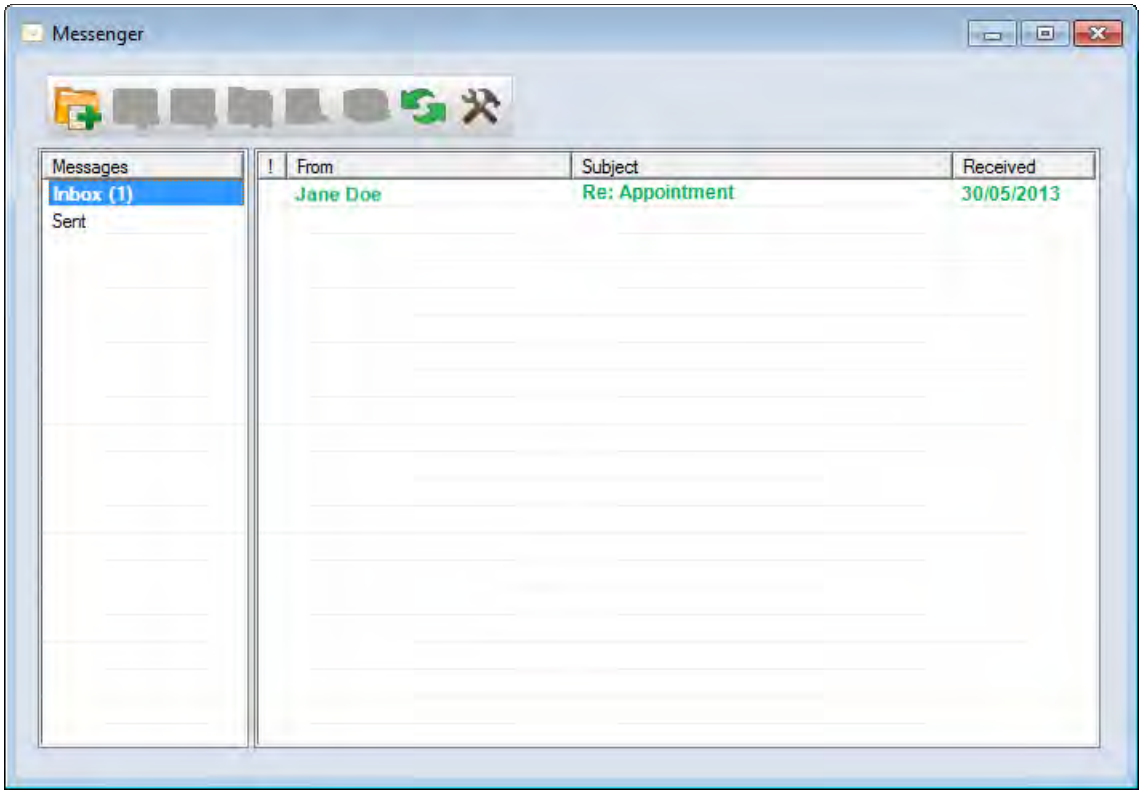
Alternatively, you can right-click the patient name, and select the **Send Patient New Message** option in the Rolodex.



axiUm displays the New Message window. The patient's name is shown here in green text.

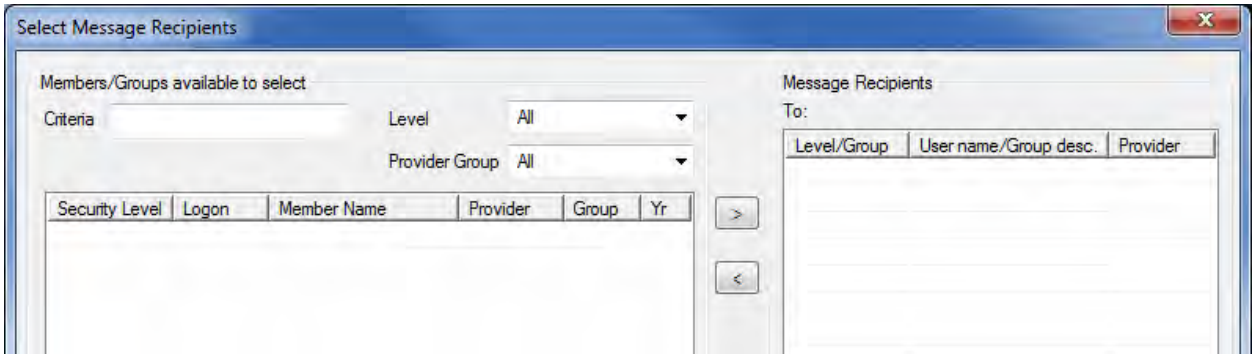


Patient messages received by the provider display in green text.

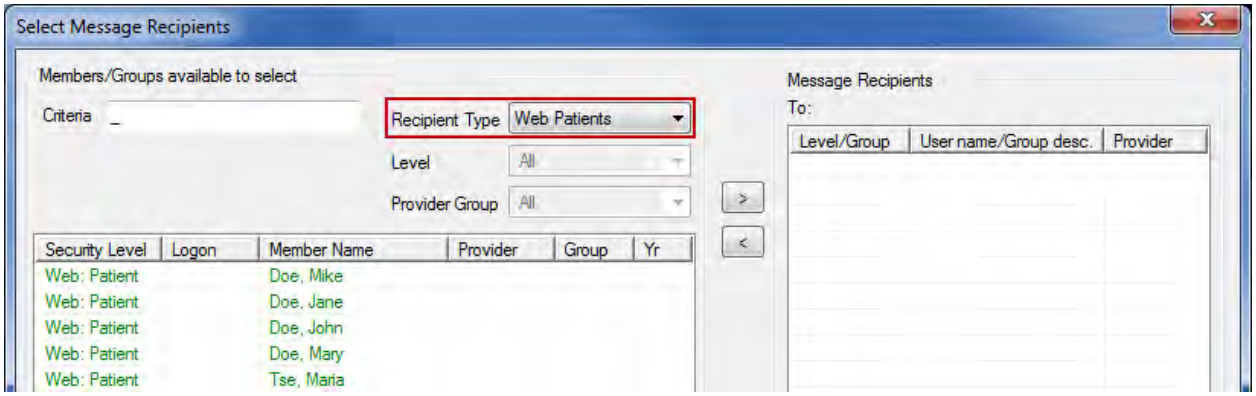


There is a **Recipient Type** drop-down list box (new), which includes a Web Patients option in the Select Message Recipients window.

Current:

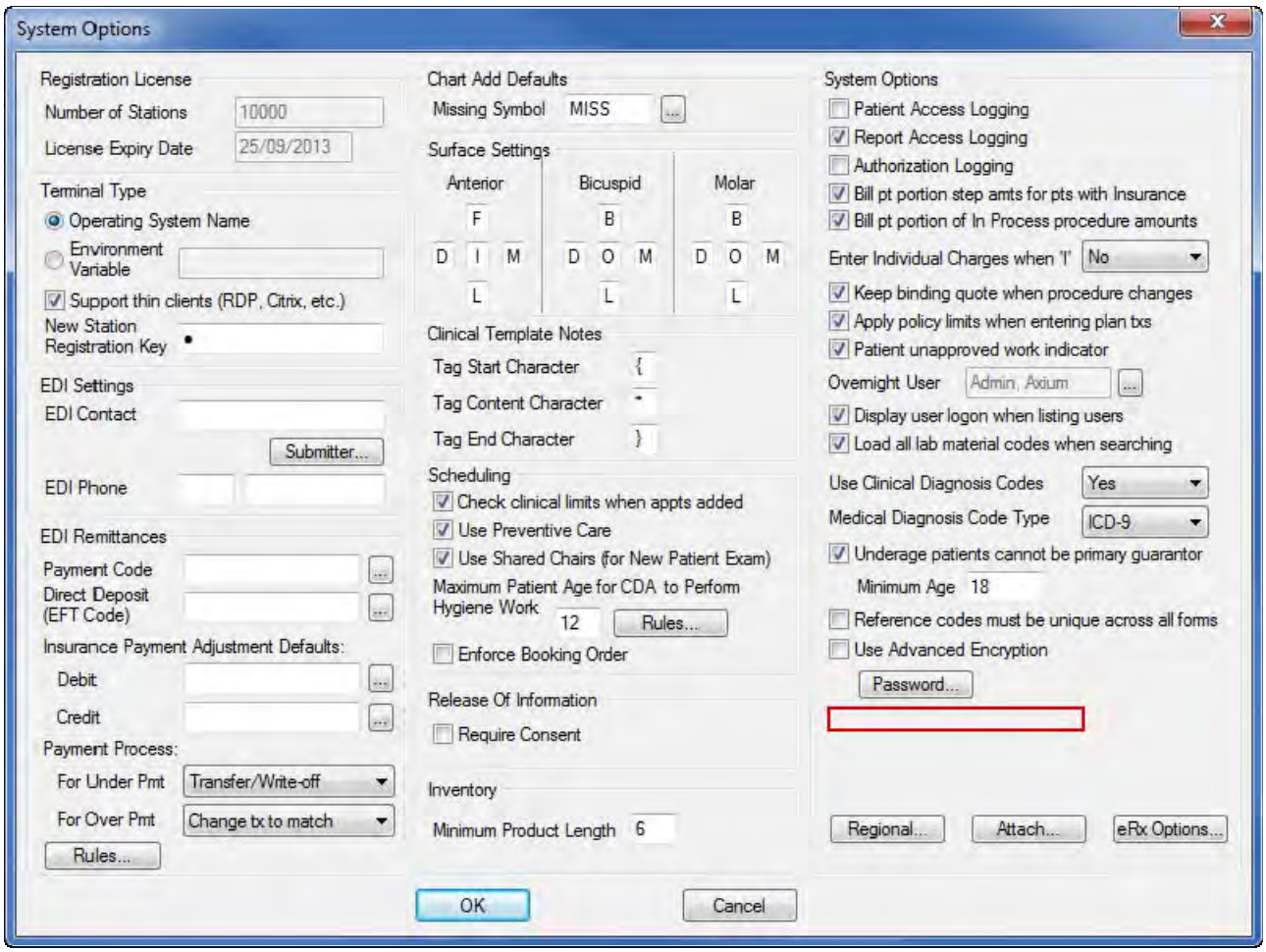


New:



There is an **Encrypt non-patient Messages** check box (new) in the System Options window.

Current:



New:

System Options

Registration License
Number of Stations 1000
License Expiry Date 26/04/2014

Terminal Type
Operating System Name
Environment Variable
Support thin clients (RDP, Citrix, etc.)
New Station Registration Key

EDI Settings
EDI Contact
Submitter...
EDI Phone

EDI Remittances
Payment Code
Direct Deposit (EFT Code)
Insurance Payment Adjustment Defaults:
Debit
Credit
Payment Process:
For Under Pmt Transfer/Write-off
For Over Pmt Change tx to match
Rules...

Chart Add Defaults
Missing Symbol MISS

Surface Settings
Anterior F D I M L
Bicuspid B D O M L
Molar B D O M L

Clinical Template Notes
Tag Start Character {
Tag Content Character *
Tag End Character }

Scheduling
Check clinical limits when appts added
Use Preventive Care
Use Shared Chairs (for New Patient Exam)
Maximum Patient Age for CDA to Perform Hygiene Work 12 Rules...
Enforce Booking Order

Release Of Information
Require Consent

Inventory
Minimum Product Length 6

System Options
Patient Access Logging
Report Access Logging
Authorization Logging
Bill pt portion step amts for pts with Insurance
Bill pt portion of In Process procedure amounts
Enter Individual Charges when 'I' No
Keep binding quote when procedure changes
Apply policy limits when entering plan txs
Patient unapproved work indicator
Overnight User Admin, Axium
Display user logon when listing users
Load all lab material codes when searching
Use Clinical Diagnosis Codes Yes
Medical Diagnosis Code Type ICD-9
Underage patients cannot be primary guarantor
Minimum Age 18
Reference codes must be unique across all forms
Use Advanced Encryption
Password...
Encrypt non-patient Messages

Regional... Attach... eRx Options...

OK Cancel

Patient Attachments

118464 – New station option to suppress the printing of consent forms

Module: Patient Attachments

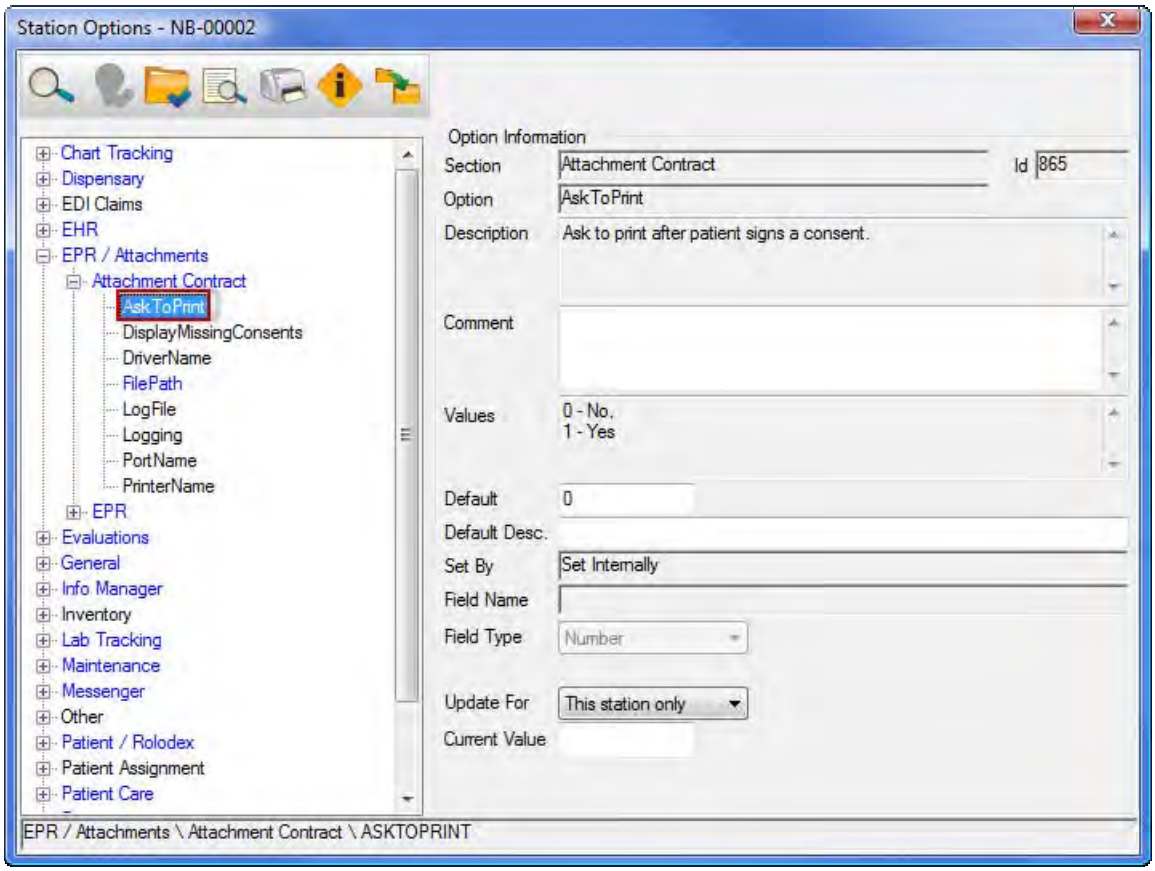
Issue: If you are a provider who requires a patient consent form to be signed, axiUm displays the Print patient Consent Question window asking if you want to print the consent if you are using Crystal .NET engine. Need the ability to suppress the Print Patient Consent Question window but still print the consent form.

Enhancement: Now has the ability to suppress the Print Patient Consent Question window.
NOTE: This is only needed when using Crystal .NET engine.

Setup:

1. Open the System Options window.

   Go to the Maintenance window - System tab - Stations icon – Station Codes window - (Station Options).



2. Go to EPR / Attachments section – Attachment Contract section – AskToPrint item (new).

3. In the Current Value field, enter one of the following options:
   - 0 – No: axiUm suppresses the Print Patient Consent Question window.
   - 1 – Yes: axiUm displays the Print Patient Consent Question window.

Patient Card

79877 – Default Patient Status

Module: Patient Card ~ Patient Options

Issue: There is no option to define a different default Patient Status for patient's registered in different clinics. A default Patient Status may be defined in Maintenance – Status Codes, but this applies to all clinics and practices.

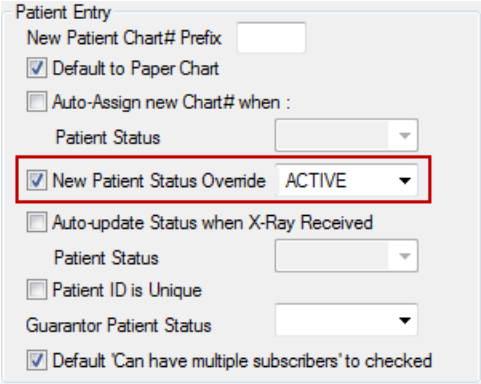
Enhancement: There is a New Patient Status Override check box available in the Patient Options window. This allows you to define the default Patient Status for patients registered on each workstation. If not defined with the Override, then patients will continue to have Status defaulted based on the default Status Code as defined in Maintenance. Patient status codes can be customized in Maintenance.

Setup:

1. Open the Patient Options window.

Go to the Patient Card window – Options/Settings icon .

2. Select the New Patient Status Override check box (new) and option from the drop-down list box and specify the Status to use as default for all new patients registered on this workstation.

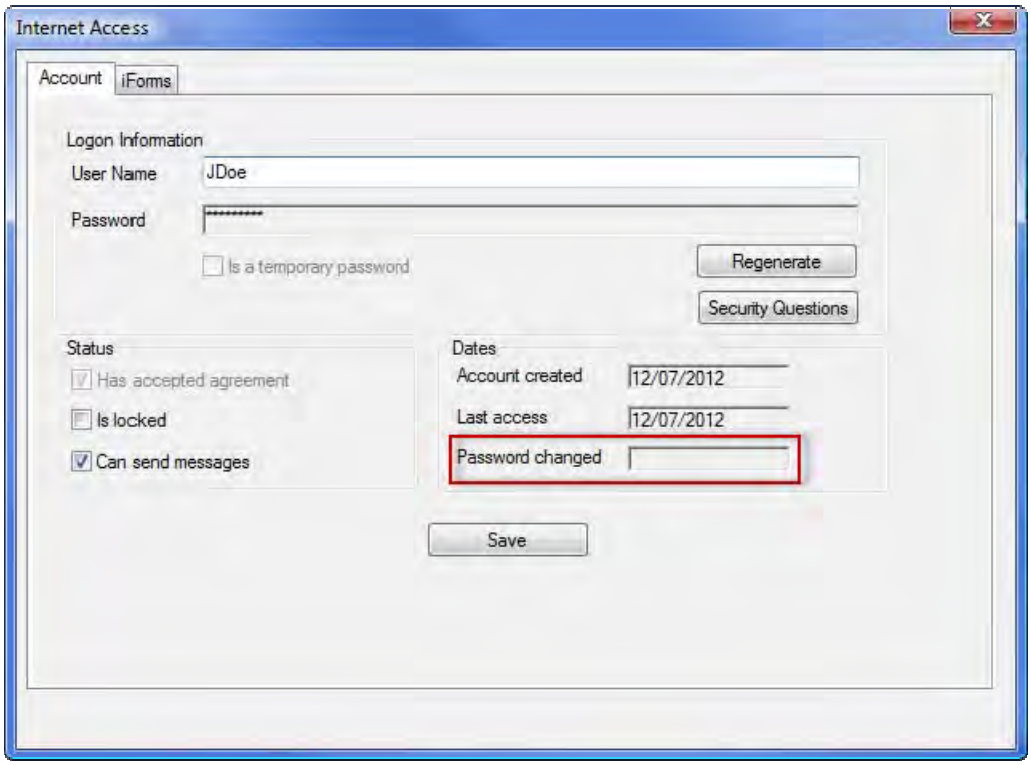


129617 – Now shows date that PatientAccess password last changed

Module: Patient Info window ~ Internet Access window

Issue: If patients are required to reset their passwords after a certain length of time, there is no indication of when their passwords were last changed. This makes it difficult for the administrator to enforce the changing of passwords.

Enhancement: Now in the Internet Access window (in Patient Info window – Personal tab – Information section – Internet Access button), the Account tab displays a **Password changed** field indicating the date that this patient's PatientAccess password was last changed.



129736 – Access to Template Age-specific Coverage window

Module: Patient Info window ~ Linked Coverage Template window

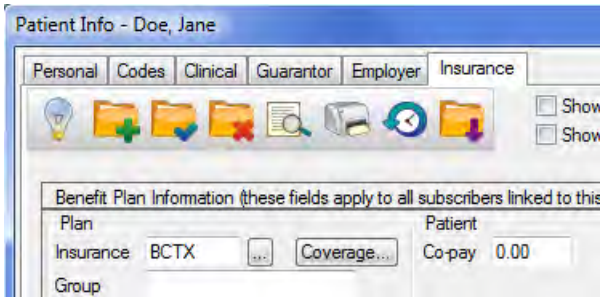
Issue: Need the ability to look at the complete copayments for any given benefit plan without having to close it and go to the coverage template. Those who have no access to the Maintenance module cannot look to see if this is an age specific.

Enhancement: Now you can access the Age-specific Coverage window from the Linked Coverage Template window.

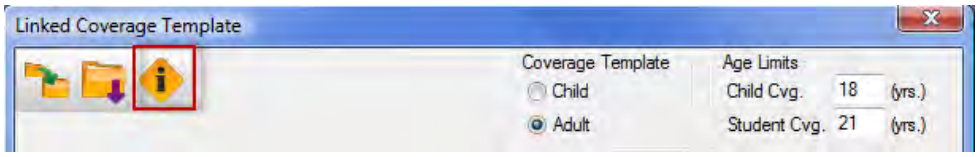
To do this:

1. Open the Patient Info window.

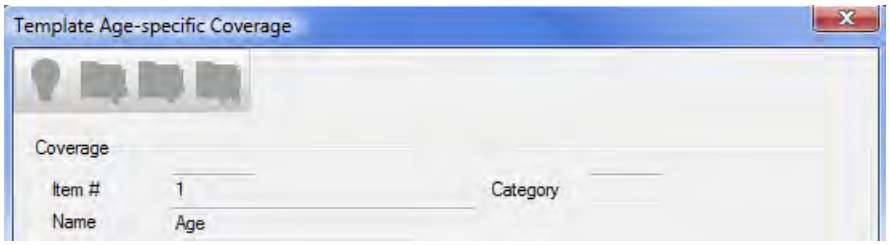
2. Click the Insurance tab.



3. Click the Coverage button.
   axiUm displays the Linked Coverage Template window.



4. Click  (Age-specific Coverage Details) (new).
   axiUm displays the Template Age-specific Coverage Details window.



Previously this window was accessible only from the Maintenance window.

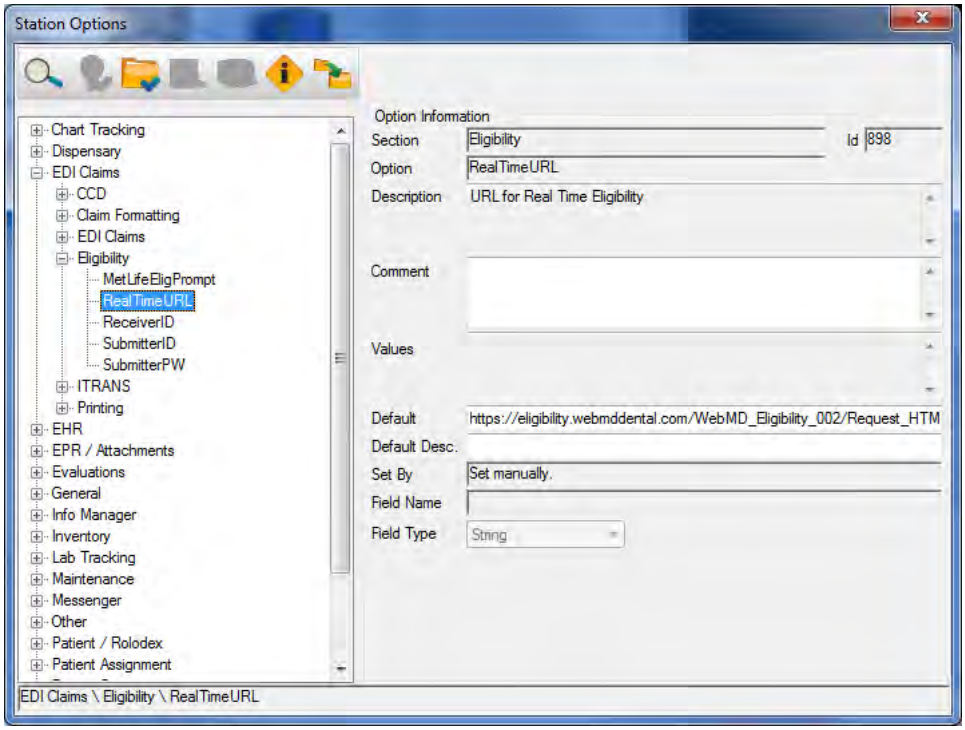
134172 – Ability to store Payer ID in database

Module: Patient Card

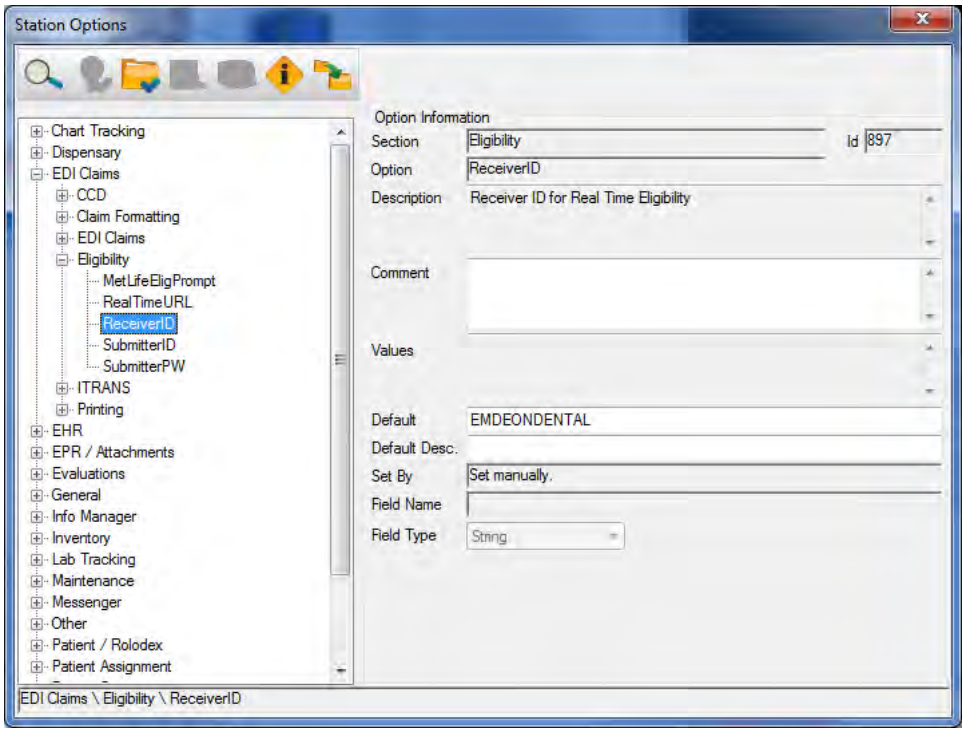
Issue: Need the ability to store the payer ID in the database so that axiUm can capture this value when sending patient eligibility queries.

Enhancement: Now axiUm has the following new station options (in Maintenance window – System tab – Station Options icon – Station Options window – EDI Claims section – Eligibility section (new):

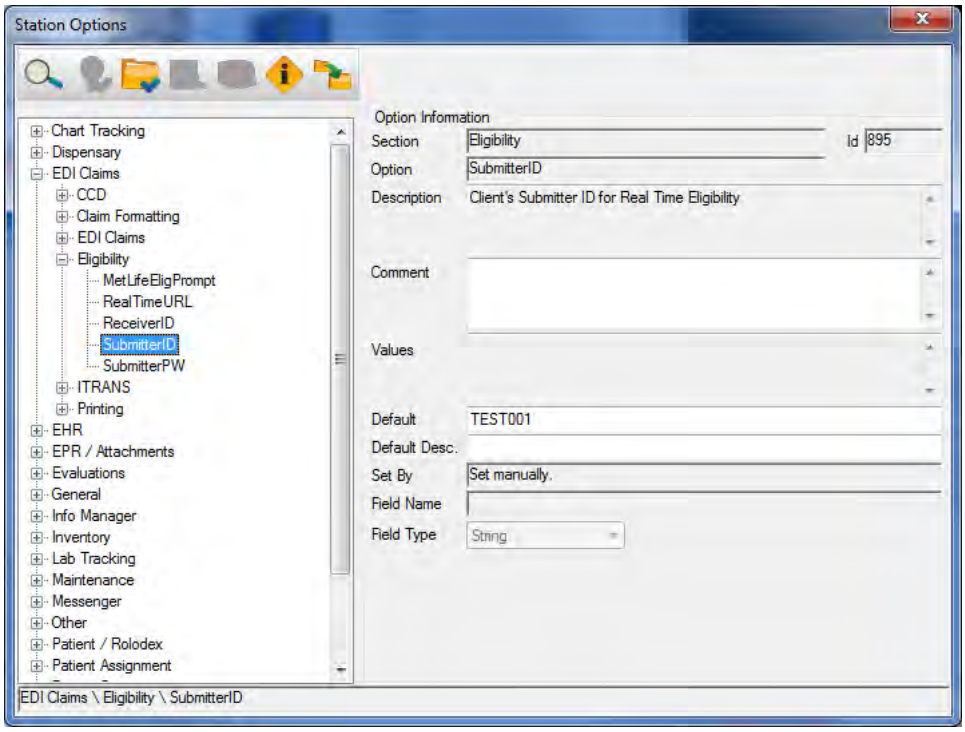
- RealTimeURL item (new):



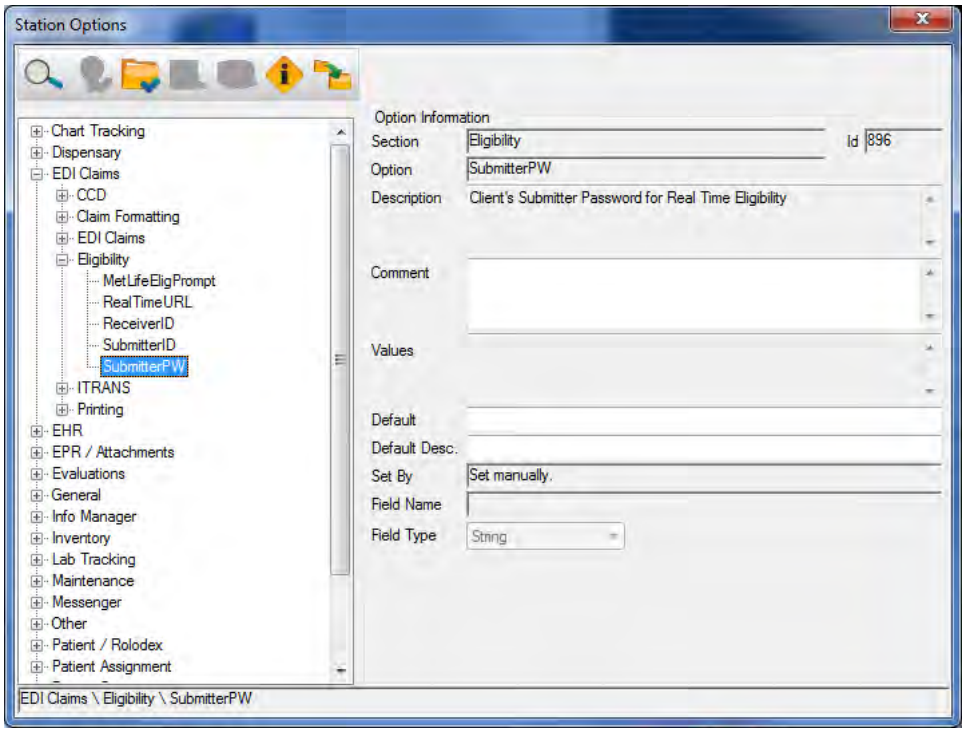
- ReceiverID item (new):



- SubmitterID item (new):



- SubmitterPW item (new):



Personal Planner

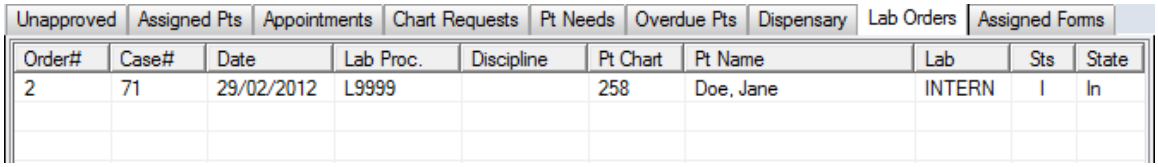
74678 – Now unapproved lab order records display in blue text

Module: Personal Planner – Assigned Forms tab, Lab Orders tab

Issue: Need the ability to identify lab order records that require approval.

Enhancement: Now in the Lab Orders tab, axiUm displays unapproved lab order records in blue text.

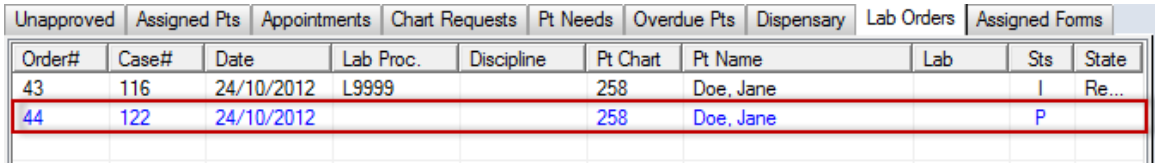
Before:



Unapproved | Assigned Pts | Appointments | Chart Requests | Pt Needs | Overdue Pts | Dispensary | Lab Orders | Assigned Forms

Order#	Case#	Date	Lab Proc.	Discipline	Pt Chart	Pt Name	Lab	Sts	State
2	71	29/02/2012	L9999		258	Doe, Jane	INTERN	I	In

After:



Unapproved | Assigned Pts | Appointments | Chart Requests | Pt Needs | Overdue Pts | Dispensary | Lab Orders | Assigned Forms

Order#	Case#	Date	Lab Proc.	Discipline	Pt Chart	Pt Name	Lab	Sts	State
43	116	24/10/2012	L9999		258	Doe, Jane		I	Re...
44	122	24/10/2012			258	Doe, Jane		P	

Also, the Assigned Forms tab now displays unapproved, assigned lab forms in blue text.

Before:

Unapproved | Assigned Pts | Appointments | Chart Requests | Pt Needs | Overdue Pts | Dispensary | Lab Orders | Assigned Forms

Chart #	Name	Form #	Date	Description	Status	Assigned To
258	Doe, Jane	189	24/07/2012	Ortho Lab Form		Caan, David

After:

Unapproved | Assigned Pts | Appointments | Chart Requests | Pt Needs | Overdue Pts | Dispensary | Lab Orders | Assigned Forms

Chart #	Name	Form #	Date	Description	Status	Assigned To
258	Doe, Jane	189	24/07/2012	Ortho Lab Form		Caan, David

130155 – New Form Page Details window

Module: PowerAdmin ~ Form Page Details window (new)

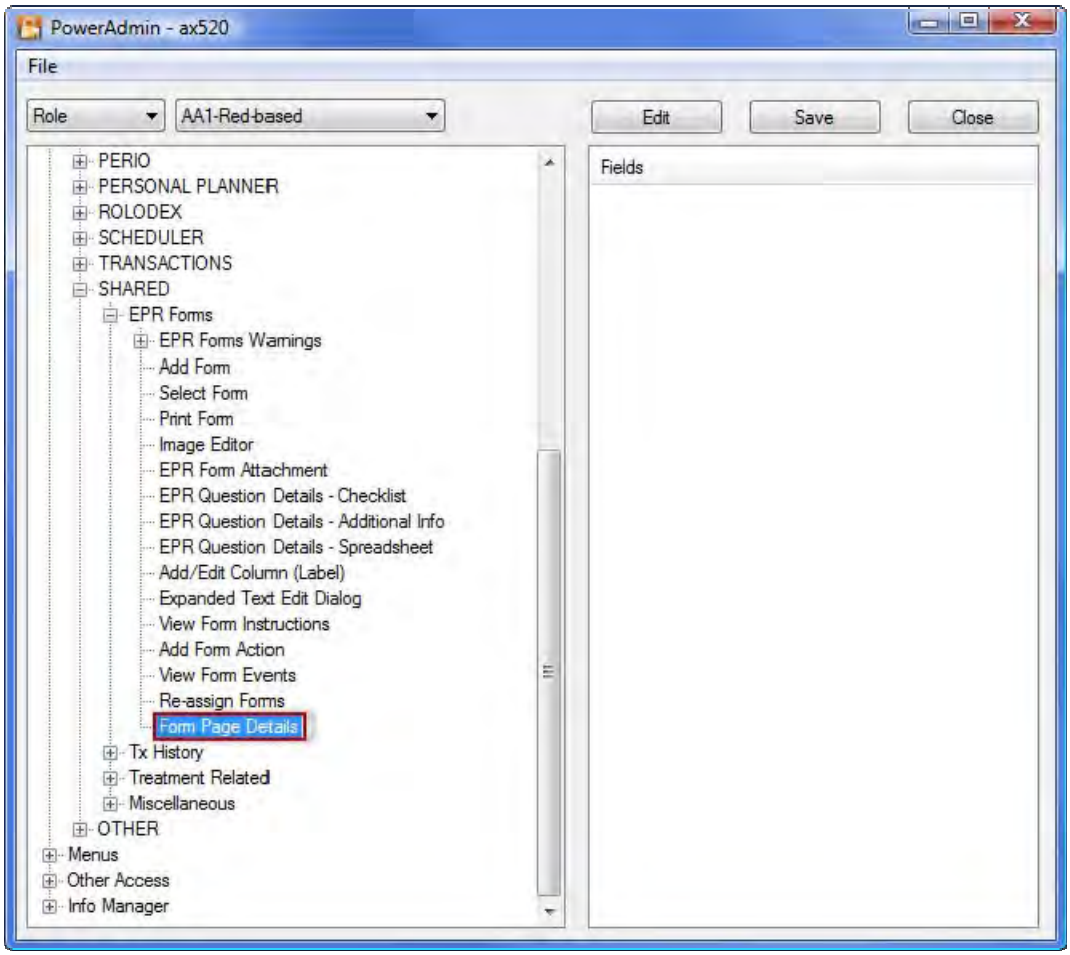
Issue: In the EHR window's Forms tab, need the ability to disable the Calculate button. Currently there is no PowerAdmin window that gives you the ability to do this.

Enhancement: There is now a Form Page Details window (new).

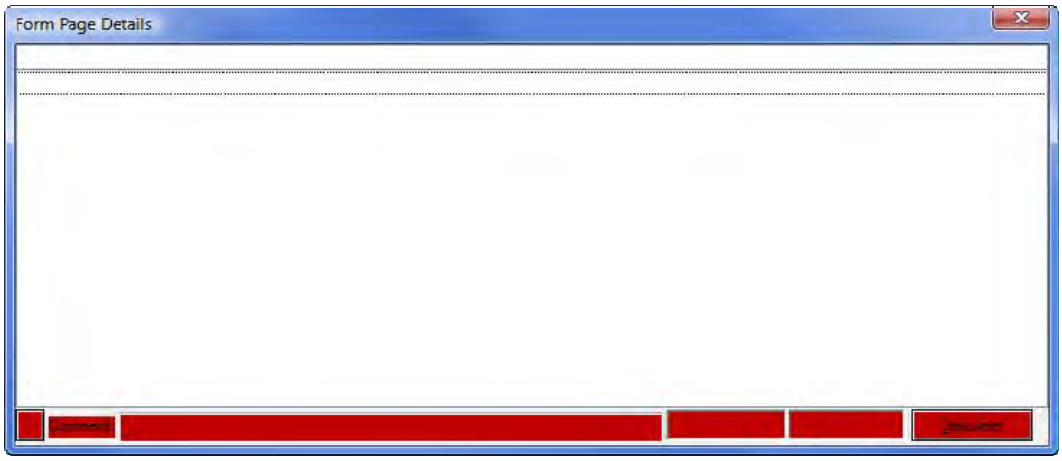
Setup:

1. Open the PowerAdmin window.

2. Go to Dialogs section – SHARED branch – New Form Page Details item.



3. Click on the New Form Page Details item.
   axiUm opens the Form Page Details window (new).



Use this window to set security on the toolbar items of any EPR form page, including the Calculate button. This security applies to all EPR forms that exist in axiUm (e.g. perio EPR forms).

56254 - Append to batched claims

Module: Rolodex

Issue: When using auto-batch claims (when the approving faculty are different), there is no method to auto-append to another claim for the same patient on the same day. When a patient is seen in two clinics in a day (e.g. radiography plus main clinic), and different faculty members approve the claims, axiUm generates two claims. This means your institution pays Emdeon twice for one patient visit.

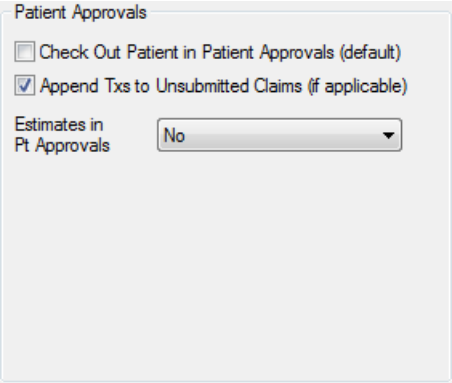
Enhancement: Now in the above scenario, axiUm appends the treatments onto the same batched claim as long as the treatment is unsubmitted and unevaluated.

Setup for Rolodex:

1. Open the Patient Options window (changed).

   Go to Rolodex window – (Options/Settings).

2. Go to the Patient Approvals section (new) and select the **Append Txs to Unsubmitted Clams (if applicable)** checkbox (new).



   Note: To set this up for multiple stations, go to Maintenance window – System tab - Station Options icon – Station Options window – Patient / Rolodex section - Patient Approvals section – AppendTxToUnsubmitted item (new).

3. Click the OK button.

   axiUm saves the changes, closes the Patient Options window, and returns to the Rolodex window.

Setup for claim forms:

1. Open the Claim Form Codes window.

   Go to Maintenance window – Insurance tab - Claim Form Codes icon.

2. Deselect the **Use Approval Faculty on Claim (where applicable)** checkbox.

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

4. Click (close).

78985 – Leave approvals dialog open after swipe if items remain

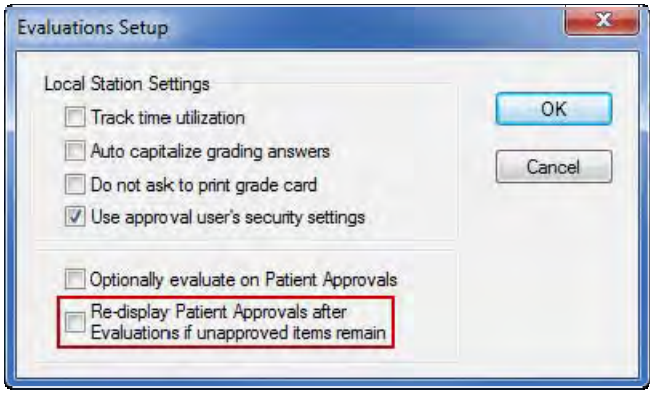
Module: Rolodex ~ Patient Approvals

Issue: Users would like the Patient Approval dialog to remain open after grading when there are other items left to approve.

Enhancement: There is a new flag in Evaluations>Setup>Re-display Patient Approvals after Evaluations if unapproved items remain. When this check box is selected, the Patient Approvals dialog will pop up after a patient has had treatment approved, grading is completed, and if there are other items remaining to be approved. Other items include treatments, notes, EPR forms, Ortho Forms, Perio Forms, Perio Chart, Letters, and Lab Orders.

Setup:

1. Open the Evaluations window.
2. Click the Setup button.
3. Select the Re-display Patient Approvals after Evaluations if unapproved items remain check box.



117790 – New diagnoses column in Patient Approvals window

Module: Rolodex ~ Patient Approvals window

Issue: Currently, the Patient Approvals window does not display the diagnosis for the selected treatment. When approving treatments, you may need to see this information.

Enhancement: There is a new Diagnoses column in the Patient Approvals window.

Current:

Charted

T	Date	Provider #	Code	Site	Surf.	Description	S	Discipline	Phase	Location	Prognosis

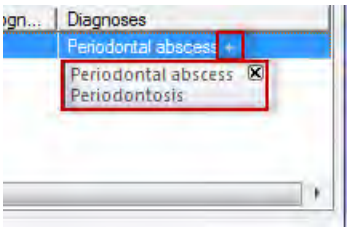
New:

Charted

Type	Date	Provider #	Code	Site	Surf.	Description	Status	Discipline	Phase	Location	Progn...	Diagnoses

If a treatment record contains multiple diagnoses:

- The Diagnoses column shows " + " (plus sign) next to the diagnoses.
- Highlighting the treatment record displays a diagnoses popup showing all associated diagnoses in alphabetical order, plus their short description.



Scheduler

New Operatory Monitor feature

Module: Scheduler

Issue: Need the ability for instructors to improve critical resolution time.

Enhancement: axiUm now has an Operatory Monitor module that lets various instructors see the status of the patients and the students, and identify those students requiring assistance (e.g. start checks, approvals, questions). For more information, see Operator Monitor Module manual on the axiUm portal.

80668 – Include Lab Order return date in warning message

Module: Scheduler ~ Scheduler Lab Warning window

Issue: If you book a patient for an appointment earlier than the date that the lab order is expected to return, axiUm displays the Scheduler Lab Warning window, “The lab order for the tx assigned to the appointment is not back yet. Are you sure you want to continue?” To find the expected return date of the lab order, you must go into the EHR module or the Lab Tracking module, find the lab order record, and open it to view the details.

Enhancement: Now axiUm displays the following new message boxes.

- If you book a patient for an appointment earlier than the date that the lab order is expected to return, axiUm displays the Lab Order Expected Date Warning window (new), “The lab order for the treatment assigned to the appointment is not expected back until <date>. Are you sure you want to continue?”

- If you book a patient for an appointment where the associated lab order has no expected return date, axiUm displays the No Expected Date Warning window, “The lab order for the treatment assigned to the appointment does not have a return date. Are you sure you want to continue?"

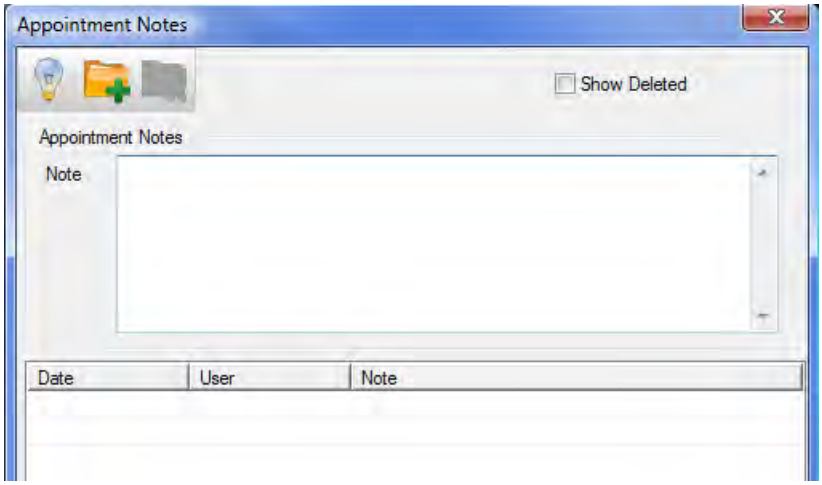
121025 – Time stamps added to Appointment Notes window

Module: Scheduler ~ Appointment Notes window

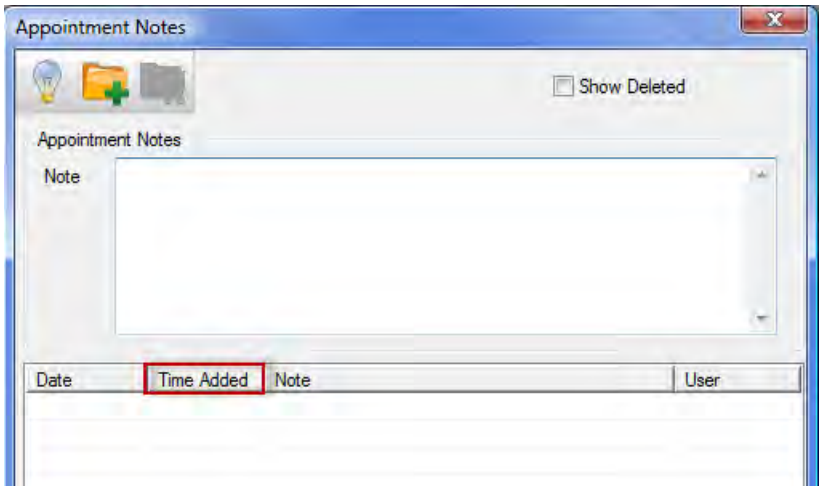
Issue: When you create an appointment note (by going to Scheduler window – Active tab – select booked appointment block – Notes right-click option), the Appointment Notes window has no time stamp. A time stamp is required for auditing purposes.

Enhancement: The Appointment Notes window now displays a Time Added column (new) that shows the time the note was created.

Current:



New:



The Time Added column has also been added to the following windows:

- New Appointment Request window
  Rolodex window - patient selection list – Appt Request right-click option.

- Appointment Request window
  Scheduler window – Availability tab – (Provider Requests) – Provider Requests window – Edit right-click option

- Ortho Appointment Request window
  Ortho Manager window - (Ortho Treatment History) – Ortho Tx History window - (Next Appt)

- New Planned Appointment window
  Scheduler window - (Rolodex) – Rolodex (Select Patient) window – select a patient - Patient Appointments window or Family Appointments window – New Planned button

- Edit Planned Appointment window
  Scheduler window - (Rolodex) – Rolodex (Select Patient) window – select a patient - Patient Appointments window or Family Appointments window – double-click on a planned appointment record.

131794 – Ability to indicate exclusive provider time

Module: Scheduler – Active tab

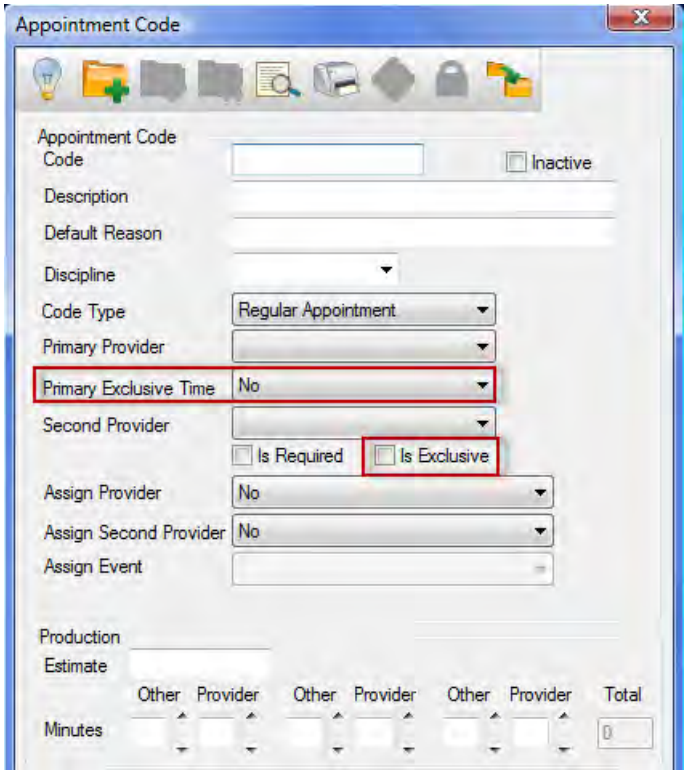
Issue: Need the ability to prevent users from double-booking providers for certain appointments (e.g. surgery).

Enhancement: You can now prevent providers from being double-booked for certain appointments.

Appointment Code Setup:

1. Open the Appointment Code window.

Go to Maintenance window – Scheduler tab – Appt., Codes icon



The following fields and options are new:

- **Primary Exclusive Time** (new): This drop-down field indicates the exclusivity rule used for this appointment code, for the primary provider. The option you select here is displayed in the appointment windows later when you create an appointment using this appointment code. This drop-down field displays the following options:

  - **No**: Selecting this option indicates that when this appointment code is selected, the provider can be double-booked for other appointments, assuming this breaks no other rules.

  - **Yes (Appt. Time)**: Selecting this option indicates that when this appointment code is used, the entire duration of the appointment is exclusive. This total time includes minutes indicated in the Provider fields and the Other fields.

  - **Yes (Prov. Time)**: Selecting this option indicates that when this appointment code is used, only the provider portion of the time is exclusive. This time refers to the minutes indicated in the Provider fields only.

- **Is Exclusive** (new): Selecting this checkbox indicates that the second provider assigned to this appointment code requires exclusive time.

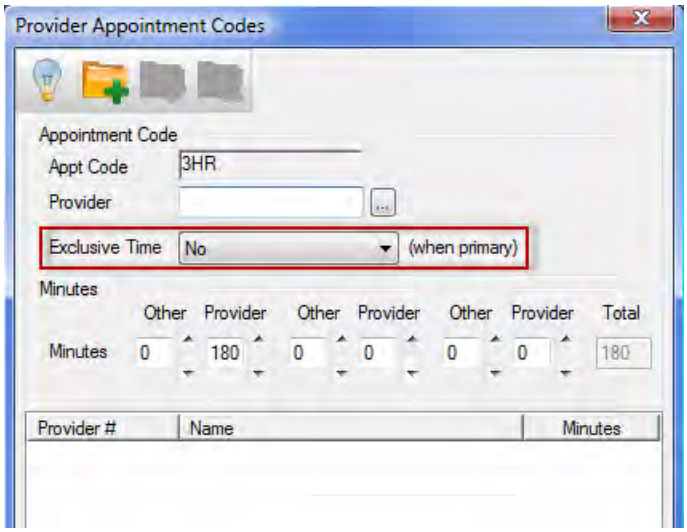
2. From the list view, select an appointment code. For our example, we will select 3HR, 3 Hour Appointment.

Code	Description	Code Type
120 MIN	2 Hour Appointment	Reg
150 MIN	2 1/2 Hour Appointment	Reg
15MIN	15 Minute Appointment	Reg
180 MIN	3 Hour Appointment	Reg
1HR	1 Hour Appointment	Reg
2.5HR	2 1/2 Hour Appointment	Reg
2HR	2 Hour Appointment	Reg
3.75 HR	3 3/4 Hour Appointment	Reg
30MIN	30 Minute Appointment	Reg
3HR	3 Hour Appointment	Reg
45MIN	45 Minute Appointment	Reg
4HR	4 Hour Appointment	Reg
RECALL	Recall Appointment	HRC

3. From the Primary Exclusive Time drop-down field, select the Yes (Appt. Time) option.

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

5. Click (Provider Appointment Codes).
   axiUm displays the Provider Appointment Codes window.



Note: When you schedule an appointment using this appointment code, axiUm overrides the minutes to the custom settings indicated in this window rather than the standard settings indicated in the Appointment Code window.

For this example, we want all providers to follow the standard exclusivity settings indicated in the Appointment Code window, so we will do nothing in the Provider Appointment Codes window.

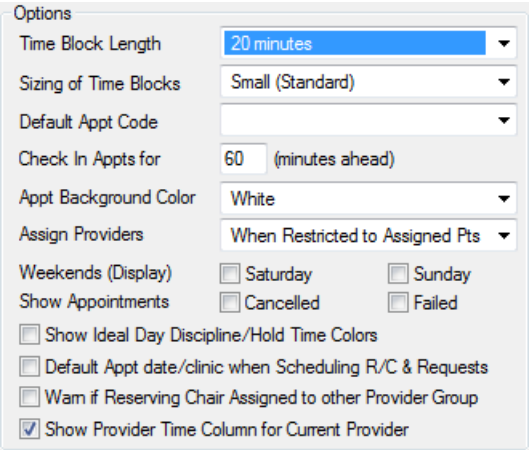
6. Click (close).
   axiUm closes the Provider Appointment Codes window and returns to the Appointment Code window.

7. Click (close).
   axiUm closes the Appointment Code window and returns to the Maintenance window.

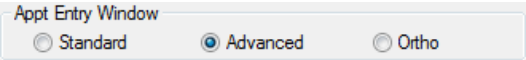
Scheduler Setup:

1. Open the Scheduler Options window.
   Go to Maintenance window – Scheduler Options icon.

2. Go to the Options section and select the Show Provider Time Column for Current Provider checkbox.
   This changes the Scheduler window to MCB (multi-chair booking) view mode.



3. Go to the Appt Entry Window section and select the Advanced option.
   This displays additional fields in the appointment windows, including exclusivity options.



4. Click the Accept button.
   axiUm saves the changes, closes the Scheduler Options window, and returns to the Maintenance window.

Usage:

1. Go to the Scheduler window's Active tab.

2. Create an appointment using the appointment code we set up earlier. In our example, this was 3HR, 3 Hour Appointment.

   Note that the New Appointment window (Advanced mode) displays the Exclusive Provider Time drop-down field (new), and this defaults to the Yes (Appt. Time) option we set up earlier for this appointment code. You can change this.

New Appointment

Patient
Ms. Doe, Jane - 258
1019 Graham Dr.
100 Palms, CA, 92274
Home (760) 524-1748
Work (509) 941-7033
Mobile (760) 777-9989
Other ()
Contact Home

Pt Information
Pt Status Active Patient
Time
Pref. Time 9.00

Pt Now Due 3411.00
Estimate 0.00
Pt Estimate Recalculate

Appointment
Provider D151
2nd Provider
Appt. Code 3HR
Tx Discipline
Appt. Status
Rank 0
Recall

Appt Details
Time Thu, May 30, 2013
08:00 am to 11:00 am
Chair DC01
Made on Thu, May 30, 2013
Last user
Sooner if possible Short Notice
NOT CONFIRMED Confirm

Accept
Cancel
Add1 Providers
Tx. Plan...
Recalls...
Check in
Check out...
Reschedule
Failed
Cancelled
Notes...
Pt. Times...

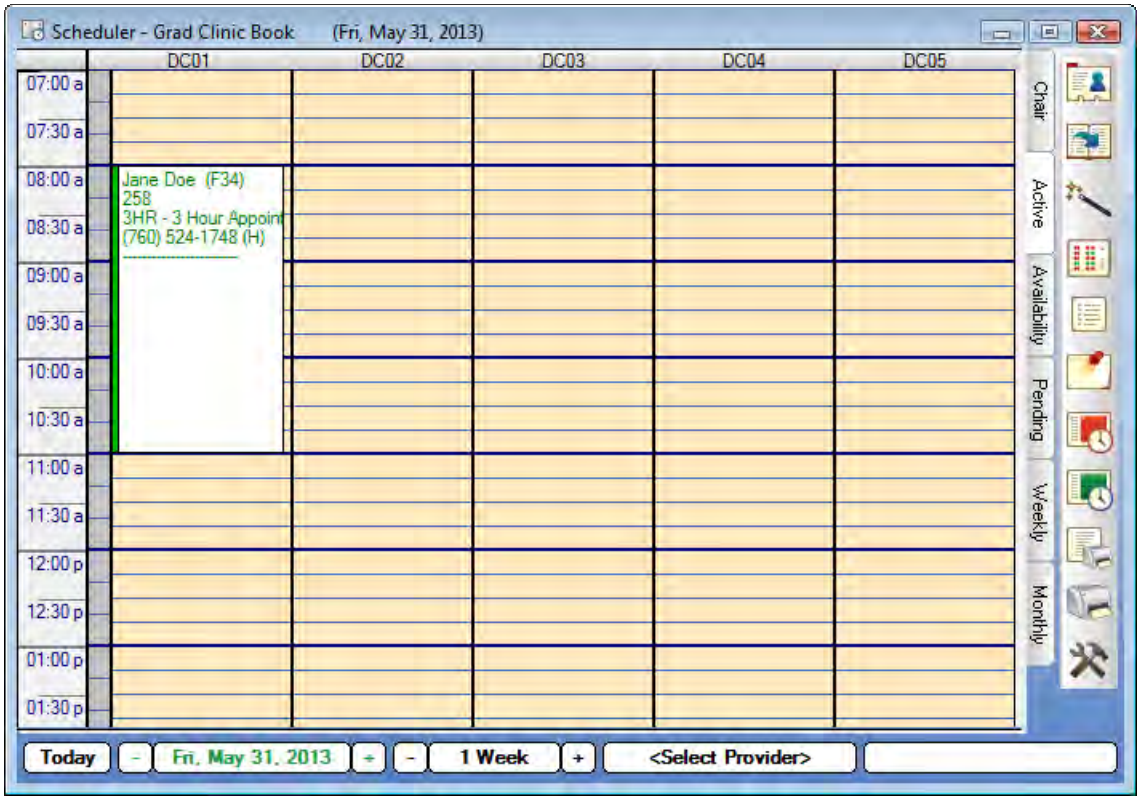
Reason

Provider Time (Minutes)

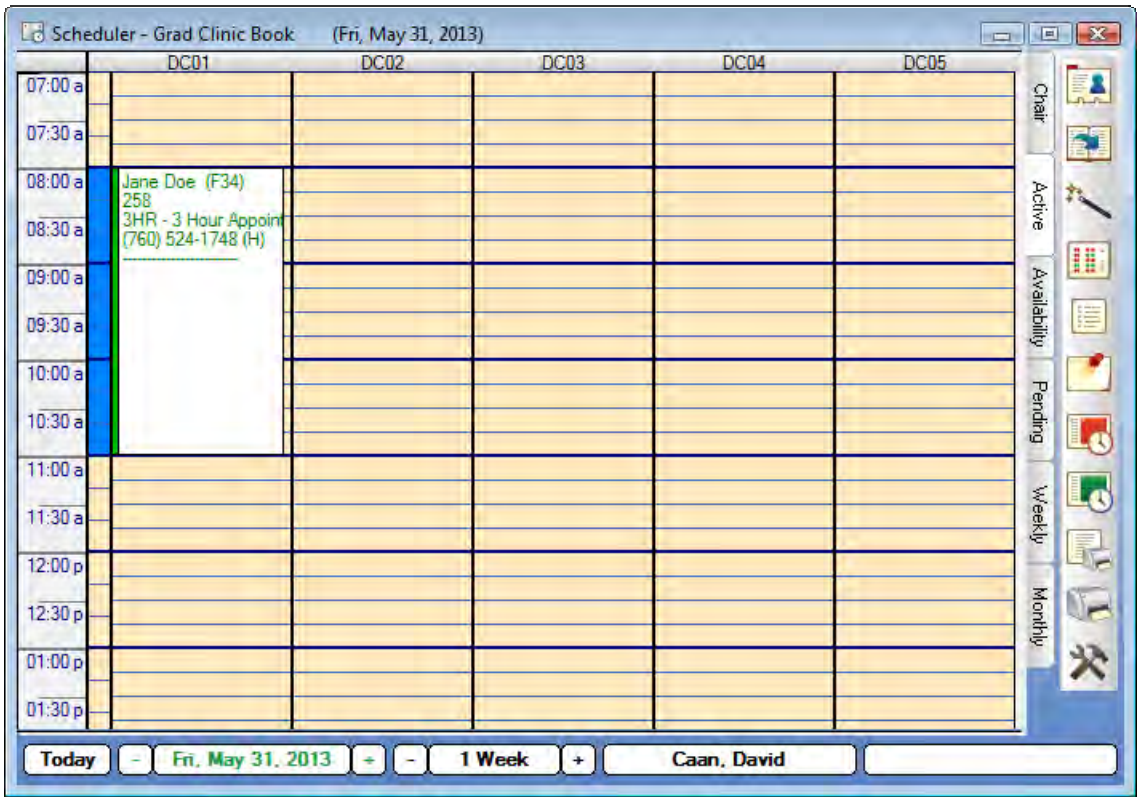
Other	Provider	Other	Provider	Other	Provider	Total
0	180	0	0	0	0	180

Exclusive Provider Time Yes (Appt. Time)
Sched. 2nd Provider For

3. Click the Accept button.
   axiUm books the appointment.



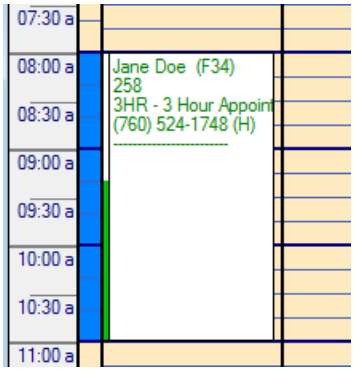
4. In the <Select Provider> field, select the provider scheduled for this appointment. For our example, this is D151, David Caan.



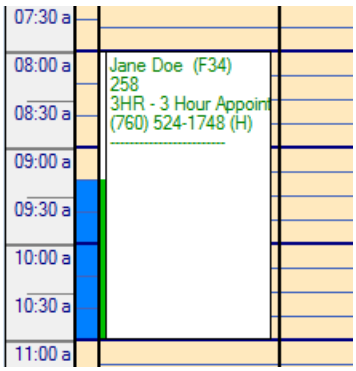
The MCB (multiple chair booking) column display blue for the selected provider's exclusive time. This is a visual indication that other appointments cannot be booked during this time even if this provider has additional chairs that are open.

If, in the New Appointment window's Exclusive Provider Time drop-down field you selected:

- Yes (Appt. Time) option (as in this example), axiUm display the entire appointment time in blue.



- Yes (Prov. Time) option, axiUm displays only the provider's portion of the appointment time in blue.



Note: If a second provider is added to an appointment, and the appointment code is set for exclusive secondary provider time, the New Appointment window's Sched. 2nd Provider For drop-down field defaults to that provider's user setting (indicated in Maintenance window – Office tab – Users icon – Users List window – run a search – select a record - (Edit Record) – Users window – Provider tab – Scheduler section - 2nd Provider Sched. For drop-down field).

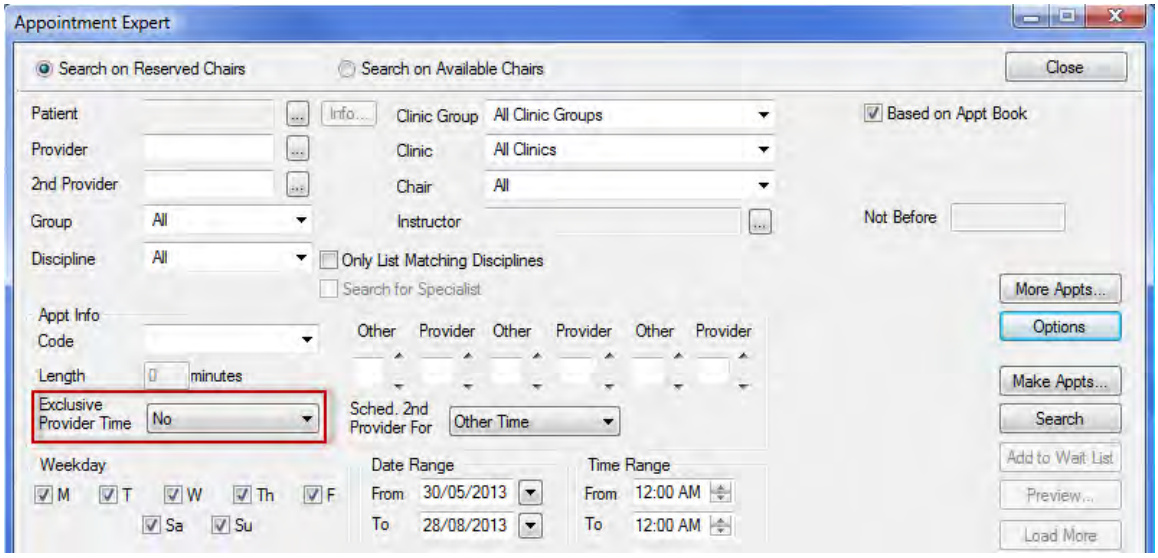
5. Try booking another appointment, in a different chair, for the same time and same provider.

   axiUm displays the Exclusive Appointment for Primary Provider Warning window.

- Yes: Click this button to override the exclusivity rule and double-book the provider.

- No: Click this button to acknowledge the exclusivity rule and discontinue booking this appointment with this provider.

About the Appointment Expert window when running a search:



Exclusive Provider Time (new): This drop-down field indicates whether to include exclusive time in the search, and whether to include overlaps in either appointment time or provider time.

Note: When you use the Appointment Expert window to search for appointments, axiUm omits any available time that also coincides with that provider's exclusive appointment. To override this, go to Appointment Expert window – Options button – Appointment Expert Options window - Include Overlaps section, and select the Yes option. Then when you run a search, axiUm includes any available time that also coincides with that provider's exclusive appointment.

Other windows displaying the new Exclusive Provider Time drop-down field:

- Edit Appointment window (Advanced mode)
- Appointment History window
- New Planned Appointment window (Advanced mode)
- Edit Planned Appointment window (Advanced mode)
- Additional Appointment Info window

134354 – Site & surfaces not displaying on appointment display

Module: Scheduler – Active tab, Patient Appointments window, Family Appointments window

Issue: Need the ability for the appointment information popup to display tooth sites and surfaces.

Enhancement: Now has the ability for the appointment information popup to display tooth sites and surfaces when the popup is accessed from the following windows:

- Scheduler window's Active tab
- Patient Appointment window or the Family Appointment window

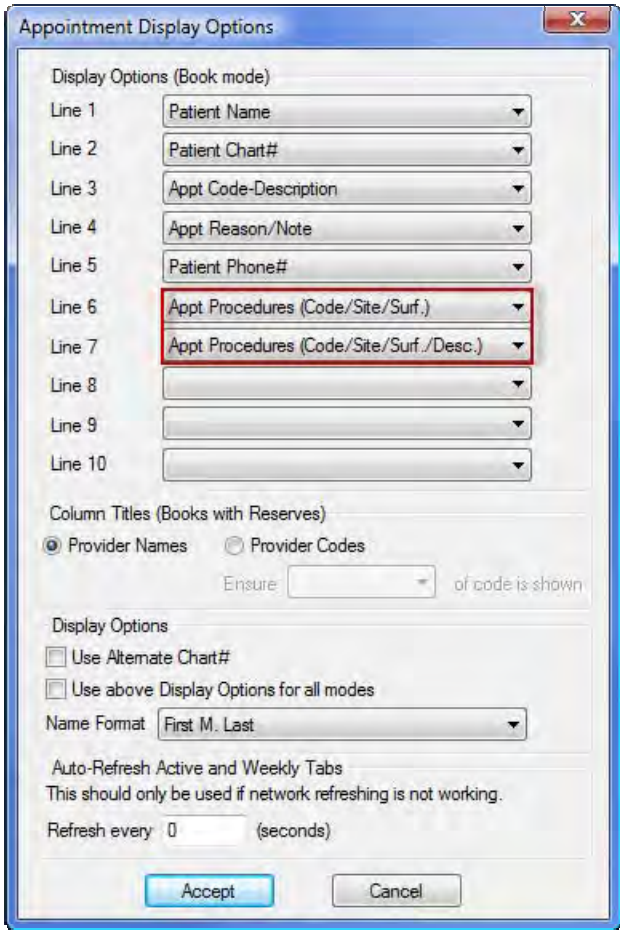
Setup:

First, we will define the popup displayed in the Scheduler window's Active tab.

1. Open the Appointment Display Options window.

   Go to Scheduler window – (Options/Settings) – Scheduler Options window – Scheduler Type section – Display button.

2. Go to the Display Options sections and using the Line 1 –10 drop-down fields, enter the following two new options:
   - Appt Procedures (Code/Site/Surf.)
   - Appt Procedures (Code/Site/Surf./Desc.)



3. Click the Accept button.

   axiUm saves the entries, closes the Appointment Display Options window, and returns to the Scheduler Options window.

   You have successfully defined the popup, displayed in the Scheduler window's Active tab, to include tooth site and surfaces.

   Next, we will define the popup to include the same information when accessed from the Patient Appointments window or the Family Appointments window.

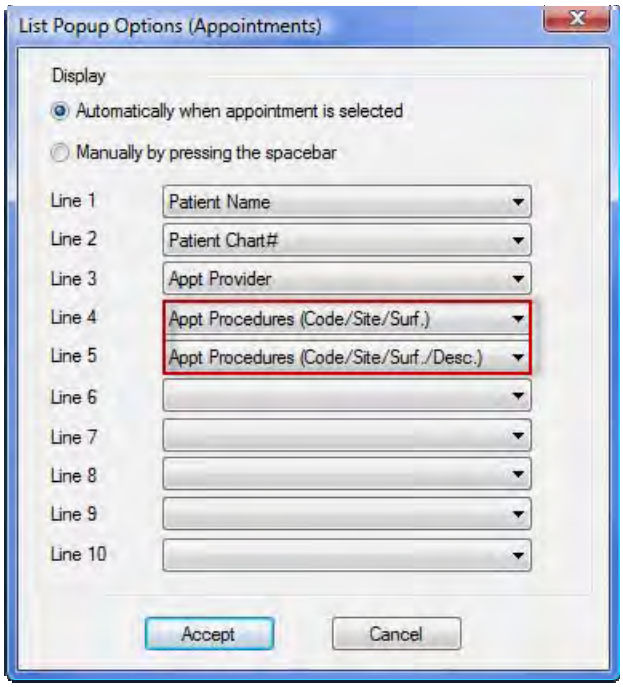
4. Open the List Popup Options (Appointments) window.

   Go to Scheduler window – (Options/Settings) – Scheduler Options window – Scheduler Type section – List Popups button.

5. Go to the Display Options sections and using the Line 1 –10 drop-down fields, enter the following two new options:
   - Appt Procedures (Code/Site/Surf.)
   - Appt Procedures (Code/Site/Surf./Desc.)

6. Select the **Automatically when appointment is selected** option.

   This automatically displays the popup when you highlight a treatment record in the Patient Appointment window or the Family Appointment window.



7. Click the Accept button.

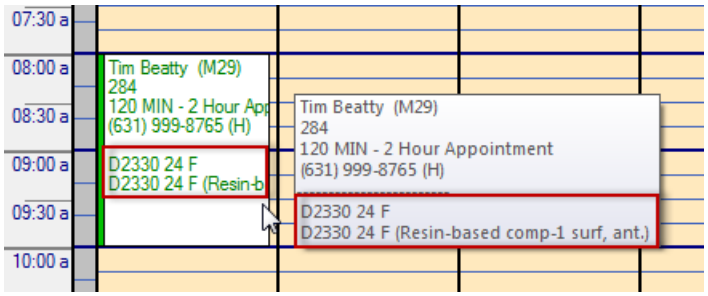
   axiUm saves the entries, closes the List Popup Options(Appointments) window and returns to the Appointment Display Options window.

   You have successfully defined the popup window accessed from the Patient Appointments window or the Family Appointments window.

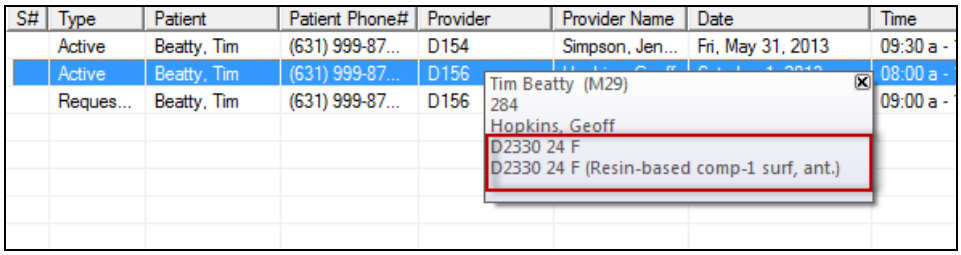
Usage:

When you schedule an appointment for a treatment indicating tooth sites and surfaces:

- Go to the Scheduler window's Active tab and hover over an appointment block. axiUm displays the tooth sites and surfaces. If the appointment block is too small to display all the details, the associated popup will show this.



- Go to the Patient Appointments window or the Family Appointments window and highlight a record in the list view to display the popup. axiUm displays the tooth sites and surfaces.

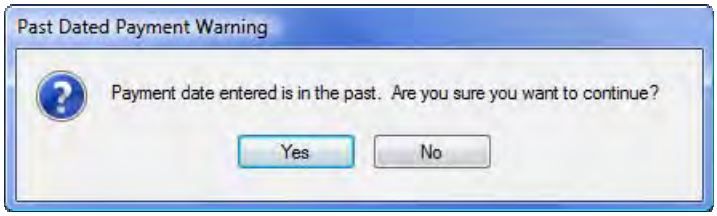


Transactions

33769 – Ability to turn off Past Dated Payment Warning window

Module: Transactions – Payment tab

Issue: When you create either a patient payment record or an insurance payment record, and you use a date in the past, axiUm displays the Past Dated Payment Warning window. Need the ability to prevent this warning from displaying.



Enhancement: You can now prevent this warning from displaying.

Setup:

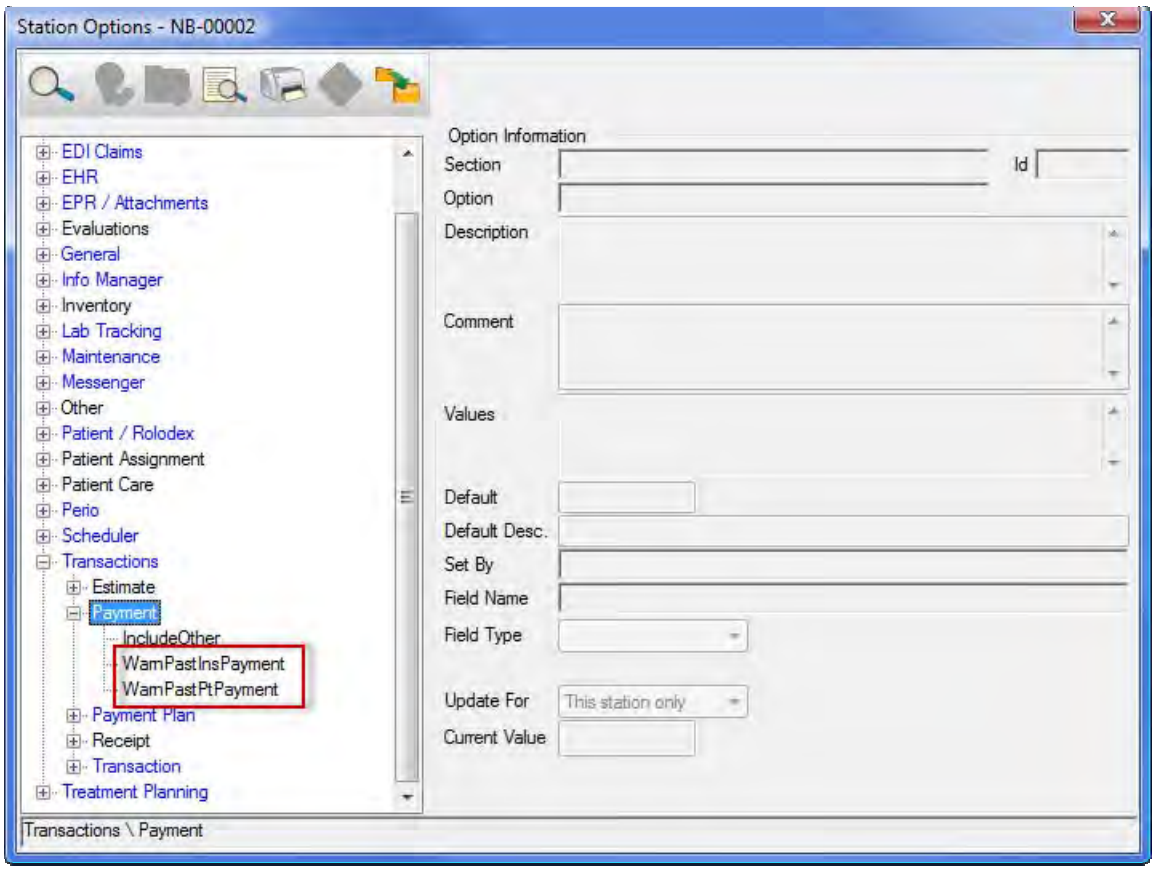
1. Open the Station Options window.

   Go to the Maintenance module - System tab - Stations icon – Station Codes window - (Station Options).

2. Go to Transactions section – Payment section.

   The following items are new:

   - **WarnPastInsPayment**
   - **WarnPastPtPayment**



3. Open each station option listed above, and in the Current Value field, enter 0.

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

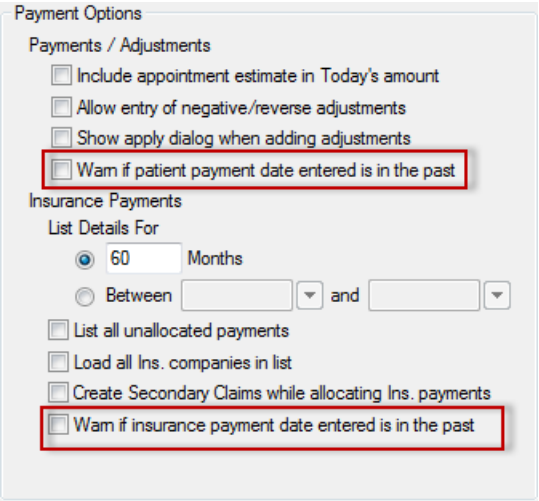
5. Click (close).
   axiUm closes the Station Codes window and returns to the Maintenance window.

6. Open the Transaction Options window.

   Go to Transactions window – (Options/Settings).

7. Go to the Payment Options section (changed).

   The following checkboxes are new:
   - **Warn if patient payment date entered is in the past** checkbox (new).
   - **Warn if insurance payment date entered is in the past** checkbox (new).



8. Deselect following checkboxes:
   - **Warn if patient payment date entered is in the past** checkbox
   - **Warn if insurance payment date entered is in the past** checkbox

   Note: The default will be to display the Back Dated Payment warning for both Patient Payments and Insurance Payments.

9. Click the OK button.
   axiUm saves the changes, closes the Transaction Options window, and returns to the Transactions window.

Then when you go to the Transactions window and create either a patient payment record or an insurance payment record, and you enter a date in the past, axiUm does not display the Past Dated Payment Warning window.

81843 – Attachment icon now available in Ins Payment for Patient tab

Module: Transactions – Ins Pmt tab

Issue: If you go to the Ins. Payments sub-tab and add an attachment to an insurance payment record, axiUm displays (attachment) next to the record.

Ins. Payments | Ins. Payments for Patient

Trx.#	Date	Bank	Code	Description	Amount	Applied	Reversed	Remaining
41	19/05/2011	BO	IP	Ins Check #	500.00	30.00	0.00	470.00
				Total	500.00	30.00	0.00	470.00

However, when you click on the Ins. Payments for Patient sub-tab, you do not see a copy of this attachment (there is no icon).

Ins. Payments | Ins. Payments for Patient

Trx.#	Date	Ins. Co.	Code	Description	Pmt Total	Tx Amount	Applied	Tx Balance
41	19/05/2011	BCTX	IP	Ins Check #	500.00	30.00	30.00	0.00
				Total	500.00	30.00	30.00	0.00

Need axiUm to show a copy of this attachment on the associated record in the Ins. Payments for Patient sub-tab.

Enhancement: Now when you add an attachment to an insurance payment record (in the Ins. Payments sub-tab), axiUm displays (attachment) next to the payment allocation record (in the Ins. Payments for Patient sub-tab).

Ins. Payments | Ins. Payments for Patient

Trx.#	Date	Ins. Co.	Code	Description	Pmt Total	Tx Amount	Applied	Tx Balance
41	19/05/2011	BCTX	IP	Ins Check #	500.00	30.00	30.00	0.00
				Total	500.00	30.00	30.00	0.00

Additionally, if you go to the Ins. Payments for Patient tab, highlight a record containing an attachment, and right-click to display a list of options, there is a View Attachment right-click option (new).

Ins. Payments | Ins. Payments for Patient

Trx.#	Date	Ins. Co.	Code	Description	Pmt Total	Tx Amount	Applied	Tx Balance
41	19/05/2011	BCTX			0.00	30.00	30.00	0.00
					0.00	30.00	30.00	0.00

View Attachment
Disbursement
Refund OverPayment
Reverse Payment
Print List

Selecting this option displays the attachment. If there is more than one attachment, axiUm displays the Select Attachment (Ins Pmt) window for selecting one to view.

121719 – Changes to Applying Ins Payment window

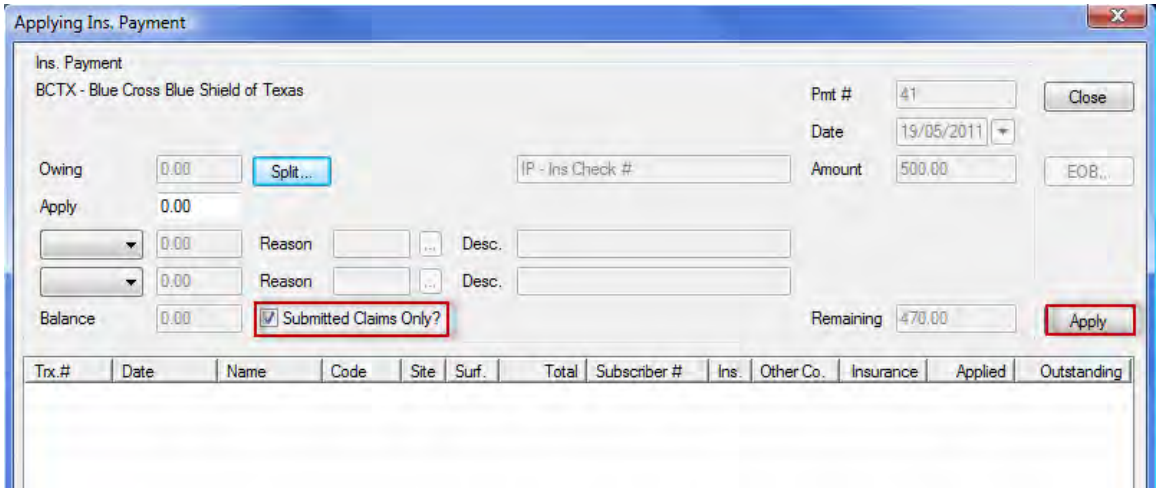
Module: Transactions

Issue: Need to improve the usability of the Applying Ins. Payment window so that you can enter insurance payments efficiently.

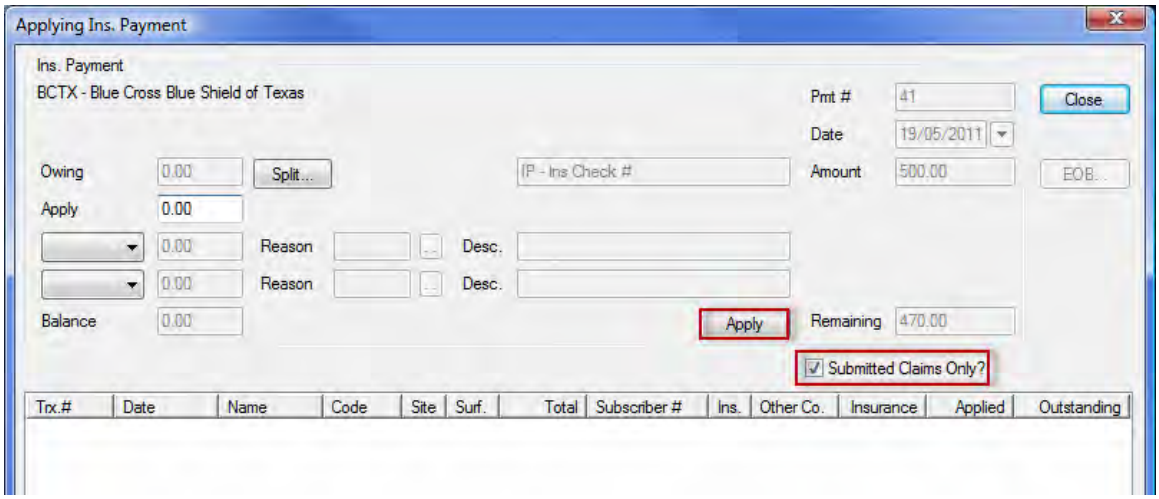
Enhancement: There have been multiple small changes to the Applying Ins. Payments window including:

- The tab order has been changed.
- On open, the first row is selected and the cursor is focused in the Apply field.
- After Applying, the next line is auto-selected.
- The location of the 'Apply' button has been moved.
- The 'Submitted Claims Only' checkbox is last in the tab order.
- A hot key (accelerator= Alt O) has been added to the 'Submitted Claims Only' checkbox. If it is not visible, hit the Alt key once (known windows issue).

Current:



New:



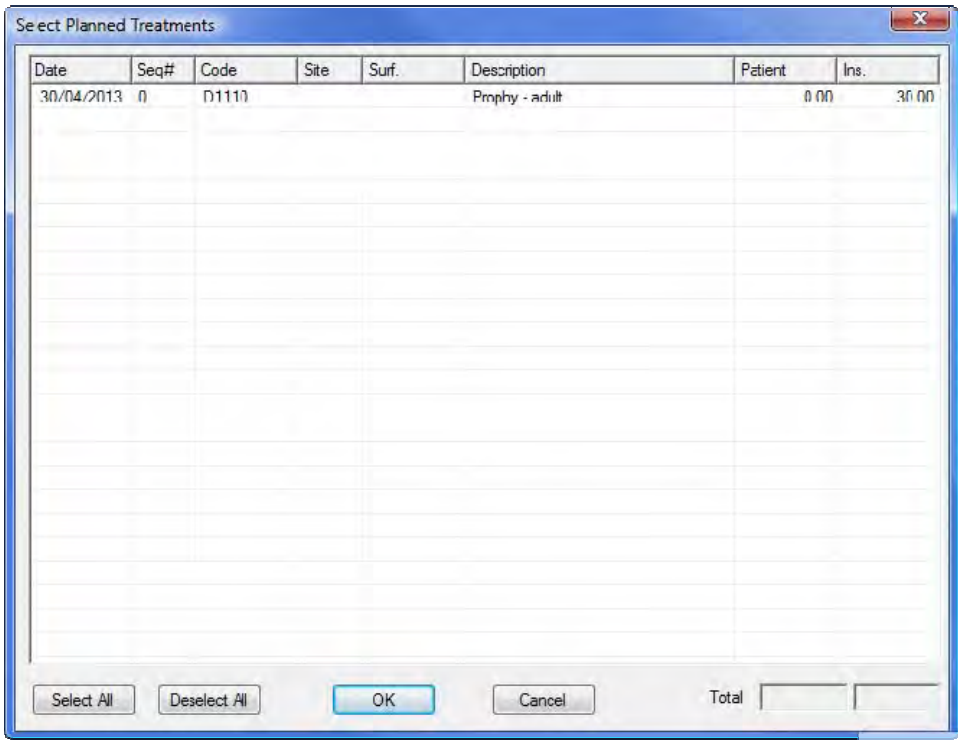
128854 – Ability to sort records in Select Planned Treatments window

Module: Transactions ~ Select Planned Treatments window

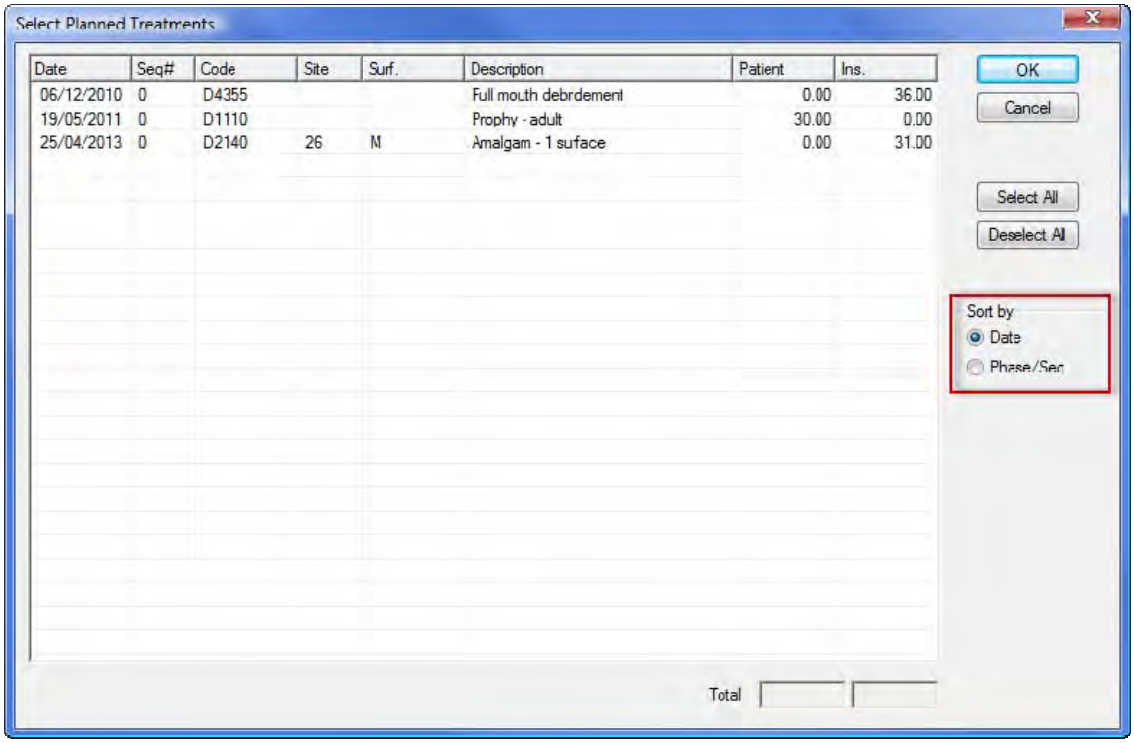
Issue: Currently, the order of the records are treatment date, phase, and sequence. Need the ability to change the sort order.

Enhancement: Changed the Select Planned Treatments window (in EHR window – Tx History tab – (Estimate))

Current:



New:



This window now displays a Sort by section (new) displaying the following options:

- Date: Selecting this option sorts the list view by treatment date.
- Phase/Seq: Selecting this option sorts the list view by phase and then sequence.

130727 – Implemented new ADA 2012 claim form

Module: Transactions

Issue: The new ADA 2012 dental claim form became available July 1, 2012. Need axiUm to support this new claim format.

Enhancement: axiUm now supports ADA 2012 dental claim forms.

132477 – Ability to enter longer pre-authorization numbers

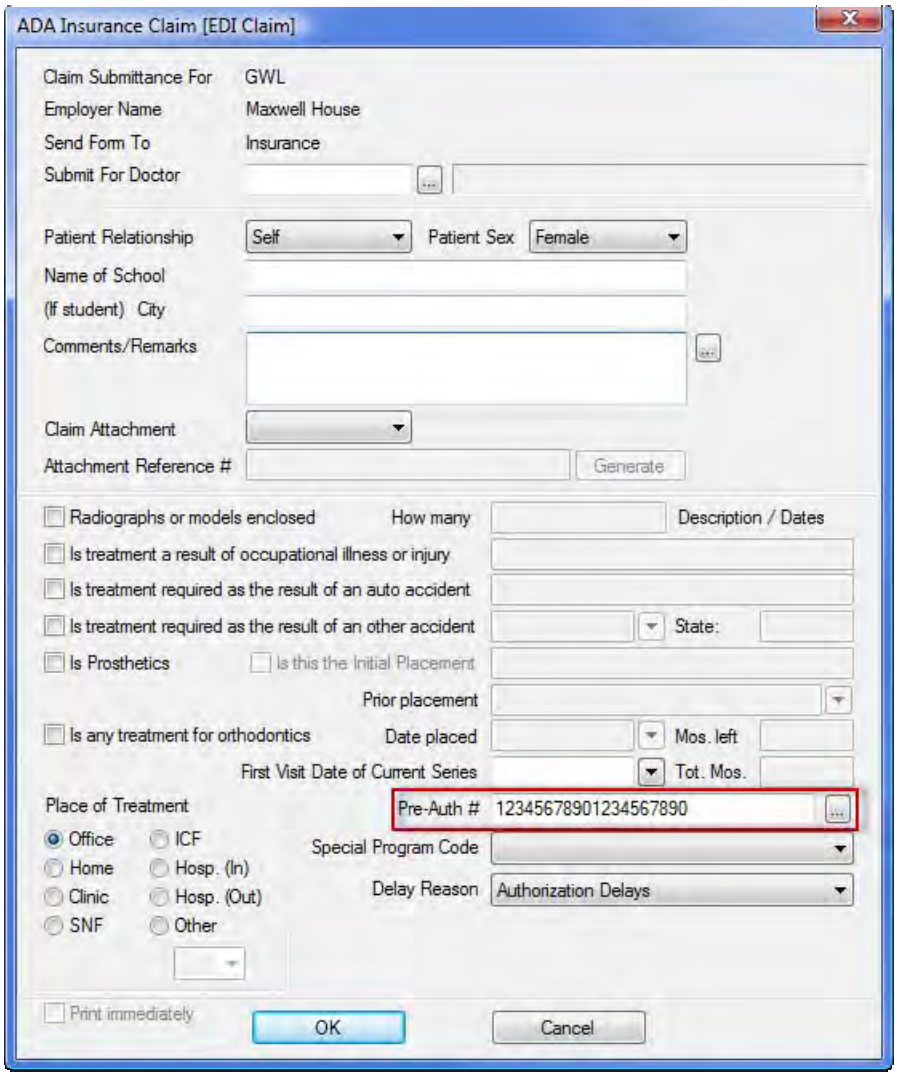
Module: Transactions ~ Tx PreAuthorization window

Issue: Some US insurance companies use pre-authorization numbers longer than 15 characters. axiUm has a limit of 15 characters, so the full pre-auth number can't be captured and submitted with the real claim. Need axiUm to increase their current limit of 15 characters.

Enhancement: In the Tx PreAuthorization window (in Transactions window – Treatment tab – PreAuthorization # right-click option), the length of the PreAuth # field has increased to 20 for US clients. Outside the US, the following limits are in place:

- Canada: 14
- Dutch: 15

Also, the axiUm Claim Dialogs have changed to accommodate longer pre-authorization numbers.



132509 – Claim forms now display billing doctor first

Module: Transactions ~ Claim Form Codes window

Issue: If the first treatment shown on the claim form was performed by someone who is not a billing provider (e.g. a hygienist), axiUm uses the generic billing doctor information for the entire claim. Need axiUm to search for the first billing provider shown on the claim form and use this as the billing entity for the entire claim.

Enhancement: Now in the Claim Form Codes window (in Maintenance window – Insurance tab – Claim Form Codes icon,) if the Use Treating Dentists as Billing Entity checkbox is selected, axiUm uses the first billing provider found on the claim form as the billing entity for the entire claim. If there is no billing provider on the claim form, axiUm uses the non-billing provider (e.g. hygienist) shown on the first treatment.

133112 – Improved traceability of unallocated insurance amounts

Module: Transactions

Issue: When Insurance Payments have been unallocated so that the treatment can be rebilled, the link between the original treatment and the rebilled one is lost. Clients find it difficult to follow the sequence of events when insurance payments are allocated, adjusted or unallocated.

Enhancement: There have been multiple changes to the Transactions area to help you trace events involving insurance payments, allocations, unallocations, and adjustments:

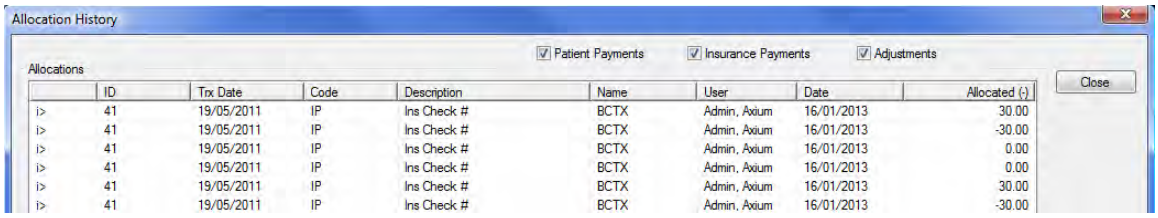
Enhancement 1: Allocation History window now shows treatment number and status

Allocation History window (changed)

Go to Transactions window – Ins Pmt – Ins. Payments tab – Pt. Allocate button – Applying Ins. Payment window – Load All button – highlight item from list view – Show Allocations right-click option – Allocations window - highlight item from list view – History button.

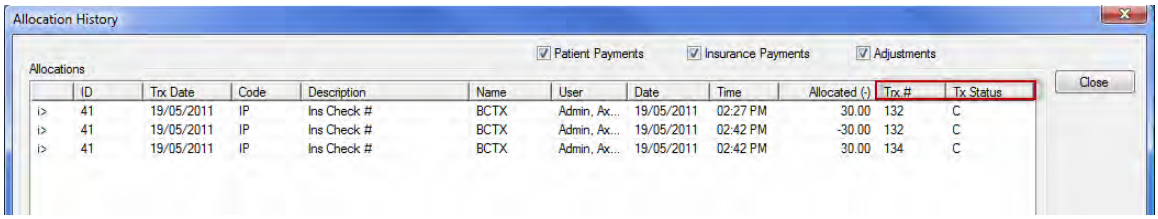
There is now a Trx # column (new) and a Tx Status column (new) to help link the initial treatment to the rebilled one. In previous versions, when you unallocated and rebilled a treatment, this link was lost. Now that the treatment number is shown, you can see both the original treatment and the new treatment.

Current:



	ID	Trx Date	Code	Description	Name	User	Date	Allocated (-)
i>	41	19/05/2011	IP	Ins Check #	BCTX	Admin, Axium	16/01/2013	30.00
i>	41	19/05/2011	IP	Ins Check #	BCTX	Admin, Axium	16/01/2013	-30.00
i>	41	19/05/2011	IP	Ins Check #	BCTX	Admin, Axium	16/01/2013	0.00
i>	41	19/05/2011	IP	Ins Check #	BCTX	Admin, Axium	16/01/2013	0.00
i>	41	19/05/2011	IP	Ins Check #	BCTX	Admin, Axium	16/01/2013	30.00
i>	41	19/05/2011	IP	Ins Check #	BCTX	Admin, Axium	16/01/2013	-30.00

New:

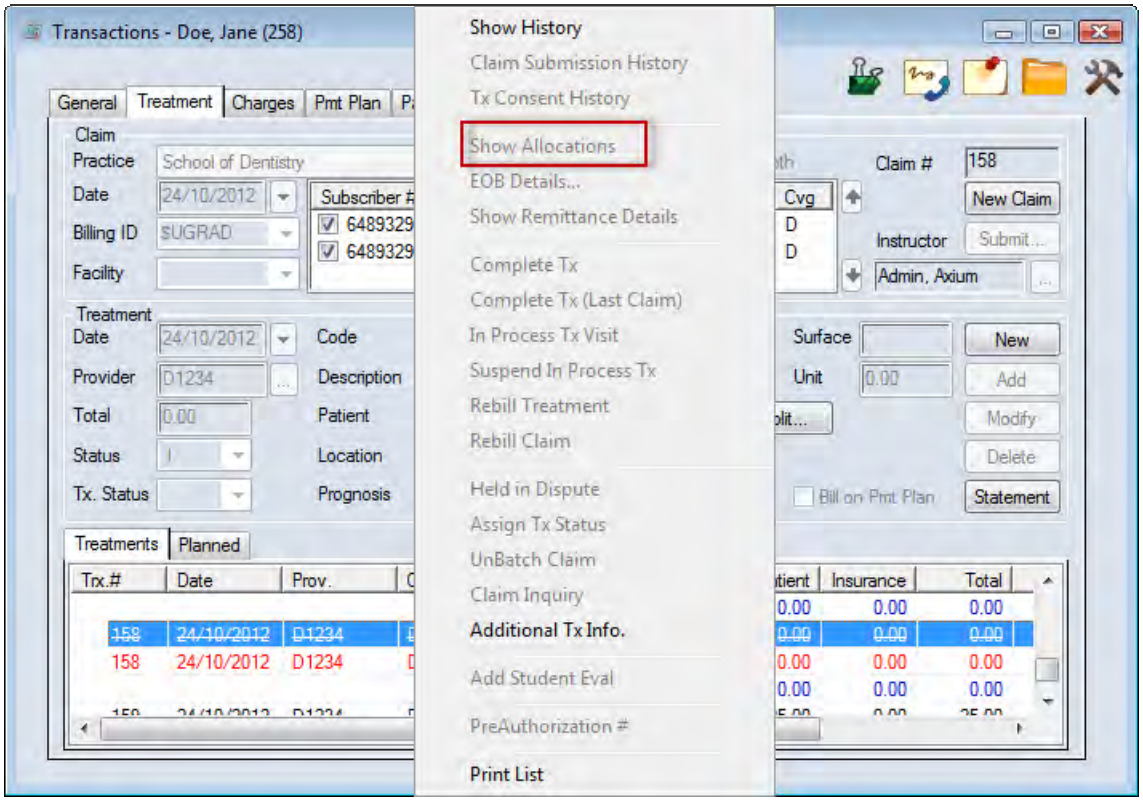


	ID	Trx Date	Code	Description	Name	User	Date	Time	Allocated (-)	Trx #	Tx Status
i>	41	19/05/2011	IP	Ins Check #	BCTX	Admin, Ax...	19/05/2011	02:27 PM	30.00	132	C
i>	41	19/05/2011	IP	Ins Check #	BCTX	Admin, Ax...	19/05/2011	02:42 PM	-30.00	132	C
i>	41	19/05/2011	IP	Ins Check #	BCTX	Admin, Ax...	19/05/2011	02:42 PM	30.00	134	C

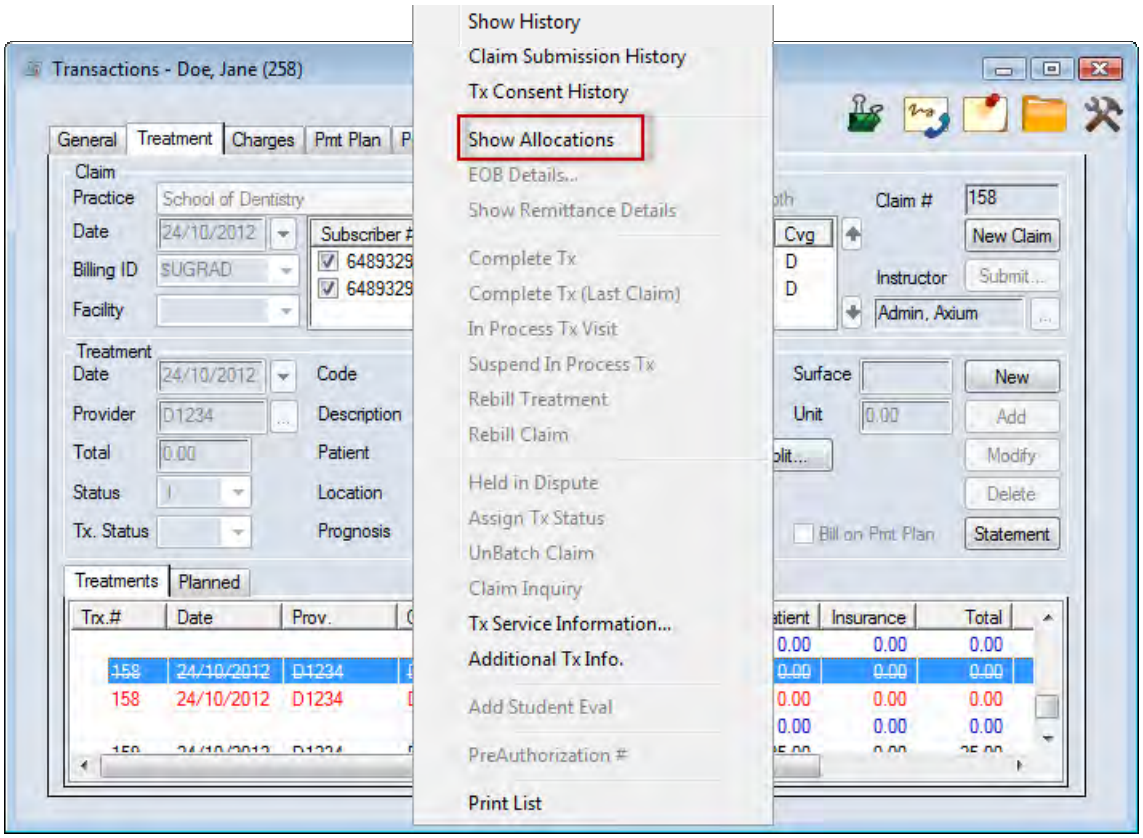
Enhancement 2: Ability to view allocations of struck-out treatment records

Go to the Transactions window's Treatment tab, and from the list view, highlight a struck-out treatment record. When you right-click to display a list of options, the Show Allocations option is enabled. In previous versions, this option was disabled. Now you can open the Allocations window and see the link between rebilled treatments.

Current:



New:



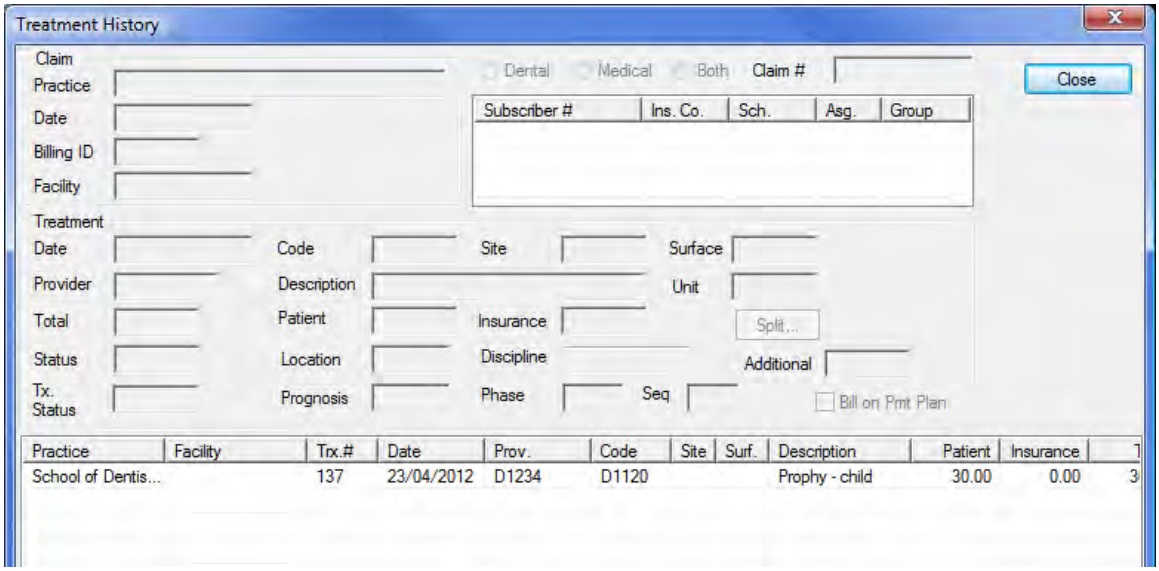
Enhancement 3: Treatment History window shows more record types

Treatment History window (changed)

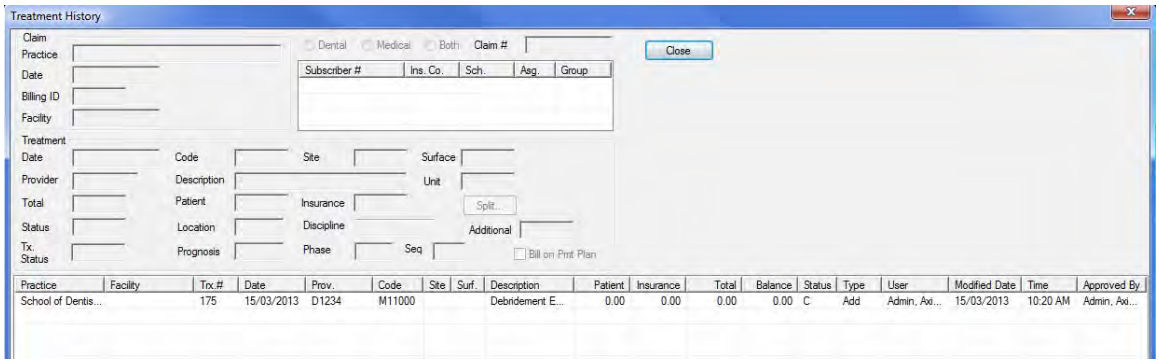
Go to Transactions window – Treatment tab – highlight record from list view – Show History right-click option.

- This window is wider to show more information.
- In previous versions, the Type column showed only Alloc whether there was an adjustment associated to it or not. This column now displays Alloc (i.e. allocation), Adj (i.e. adjustment), or Alloc/Adj (i.e. both adjustment and allocation).

Current:



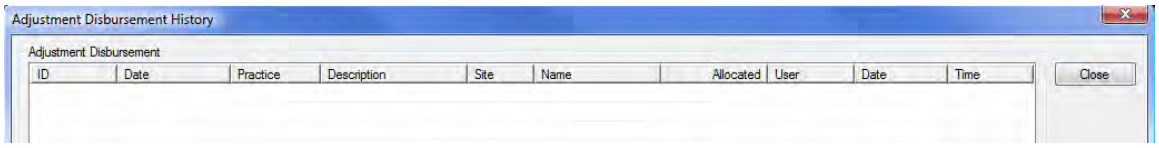
New:



<u>Enhancement 4</u>: New disbursement history windows

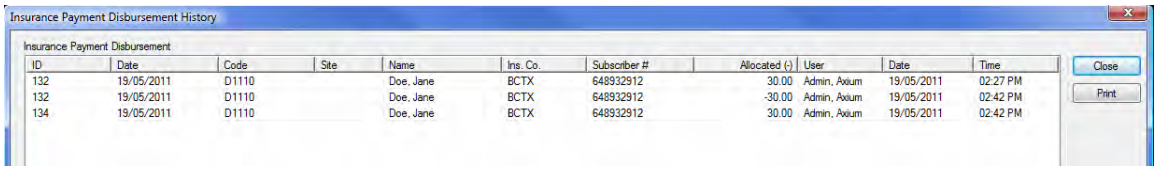
Adjustment Disbursement History window (new)

Go to Transactions window - Adjustment tab - highlight record from list view - Disbursement right-click option - Adjustment Disbursement window - History button (new)



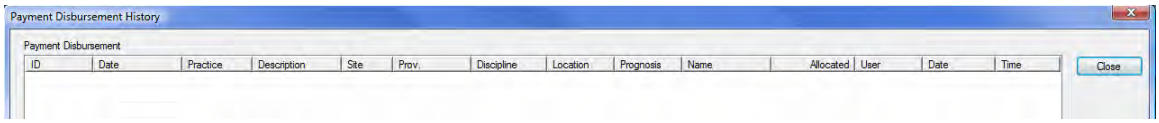
Insurance Payment Disbursement History window (new)

Go to Transactions window - Ins Pmt tab - highlight record from list view - Disbursement right-click option - Insurance Disbursement window - History button (new)



Payment Disbursement History window (new)

Go to Transactions window – Payment tab - highlight record from list view – Disbursement right-click option - Payment Disbursement window – History button (new)



Note: The windows used to access the above windows (i.e. the disbursement-type windows) may still contain historic records even if they show no records in the list view. This is because there may be no existing payment allocations, but a history still exists.

133242, 99555 – Submit Place of Service indicated on Treatment / Ability to select Mobile Unit as Place of Treatment

Module: Transactions

Issue: As Dental Claim creation will likely capture more Medical type information going forward, need to use the Place of Service entered at time of claim creation, rather than requiring this information to be entered at time of claim submission. Also, need the ability to specify Mobile Unit as a Place of Service code when submitting claims.

Enhancement: When the Place of Service is entered in the Tx Service Information window (previously the Tx Medical Information window) this will now default the Place of Service toggle on the Dental Claim Dialog and use this value to populated the Place of Service on the printed or EDI claim. If no Place of Service is entered on the claim, this toggle/claim form value will default to '11' (Office) as is done today. This value can be changed by the user on the Claim dialog.

When determining which Place of Service Code to use on the claim, axiUm will look up the Place of Service entered and then use the HIPPA value for Dental Claim and Medical EDI claims. For Medical claims dropped to paper, if the Insurance Company has a specified Service Type with a different Place Code mapping (see Maintenance | Insurance | Place of Service Codes | <i> Place Codes), this value will be used on the paper claim. If no match is found here, the Place of Service will be blank.

When the dental claim dialog opens, the Place of Service toggle will default based on the rules above, but can be changed by the user. The 'Other' toggle will allow the user to either key in a value or choose from HIPAA values defined in Maintenance that don't correspond to one of the toggles. To include a Mobile Unit place of service as selectable here, add Mobile Unit as a Place of Service Code that maps to a HIPAA value of ‘15’.

Setup:

1. Open the Place of Service Codes window.
   Go to Maintenance window - Insurance tab - Place of Service icon.

2. Create a place of service by entering the following fields:
    - Code: MOB
    - Description: Mobile Unit
    - HIPPAA (new): 15

3. Click (Place Codes)
   axiUm displays the Place Codes window.

4. Create a place code by entering the following fields:
    - Service: MC, Mobile Clinic
    - Service Place: 15.

5. Click (Add a new Record).
   axiUm saves your entries and displays the new record in the list view.

6. Click (close).
   axiUm closes the Place Codes window and returns to the Place Of Service Codes window.

7. Click (close).
   axiUm closes the Place Of Service Codes window and returns to the Maintenance window.

Usage (dental claims):

1. Go to the Transactions module.
2. Select a dental treatment.
3. Open the Tx Service Information window.
4. In the Place of Serv. Drop-down field, enter the service location you created earlier. For our example, this is MOB, Mobile Unit.
5. Submit the claim (electronic or paper).

ADA Insurance Claim [ADA 2006 (NPI) Form]

Claim Submittance For
Employer Name
Send Form To Insurance
Submit For Doctor $FAC School of Dentistry

Patient Relationship Self Patient Sex Unknown
Name of School
(If student) City
Comments/Remarks Please Pay Patient.

Claim Attachment
Attachment Reference # Generate

Radiographs or models enclosed How many Description / Dates
Is treatment a result of occupational illness or injury
Is treatment required as the result of an auto accident
Is treatment required as the result of an other accident State:
Is Prosthetics Is this the Initial Placement
Prior placement
Is any treatment for orthodontics Date placed Mos. left
First Visit Date of Current Series 08/03/2012 Tot. Mos.
Place of Treatment Pre-Auth #

Office ICF
Home Hosp. (In)
Clinic Hosp. (Out)
SNF Other

Print immediately OK Cancel

The ADA Claim form shows the Other option (new) with 15 selected in the associated drop-down field. This is enhancement 133424.

Note: By setting up "Mobile Unit" as a Place of Service, this value will be available for selection here and will be defaulted if the user chooses this Place of Service on the Tx Service Information dialog (right click on claim in Treatment tab). Alternatively, the user can key in '15' as a value on the claim dialog.

Usage (medical claims):

1. Go to the Transactions module.
2. Select a medical treatment.
3. Open the Tx Service Information window.
4. In the Place of Serv. Drop-down field, enter the service location you created earlier. For our example, this is MOB, Mobile Unit.
5. Submit the claim (electronic or paper).

   The EDI file's Place of Service shows 15.

138264 – Ability to show step procedures on statements & receipts

Module: Transactions ~ Statement report, Receipt report

Issue: When an appointment is for a step procedure (containing an associated a visit fee), and you print the Statement report, axiUm omits the step procedure. Because only the visit fee is displayed, the Statement report appears as if the patient was charged a visit fee for no reason. Need the ability to display step procedures in the Statement report.

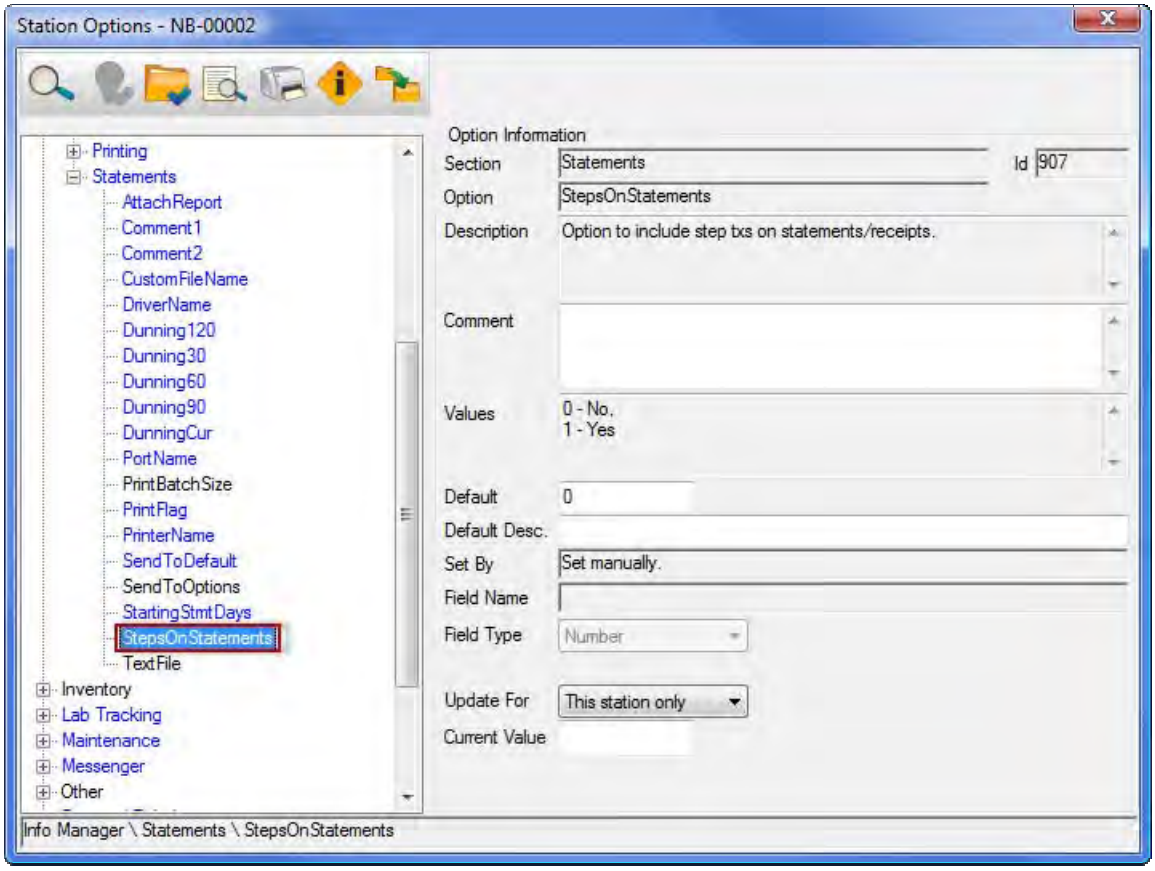
Enhancement: You now have the ability to display step procedures in the Statement report and the Receipt report.

Setup:

1. Open the Station Options window.

   Go to the Maintenance module - System tab - Stations icon – Station Codes window - (Station Options).

2. Go to Info Manager section – Statements section – StepsOnStatements item (new).



3. In the Current Value field, enter one of the following options:
   - 0 – No: Do not show procedure steps on statements and receipts.
   - 1 – Yes: Show procedure steps on statements and receipts.

79608 – Integration with SIDEXIS

Module: X-Ray

Issue: Currently there are problems bridging integration to SIDEXIS software while operating in a terminal services environment.

Enhancement: Made the necessary changes to remedy the above issue.

axiUm Release 5.20.01

Rolodex

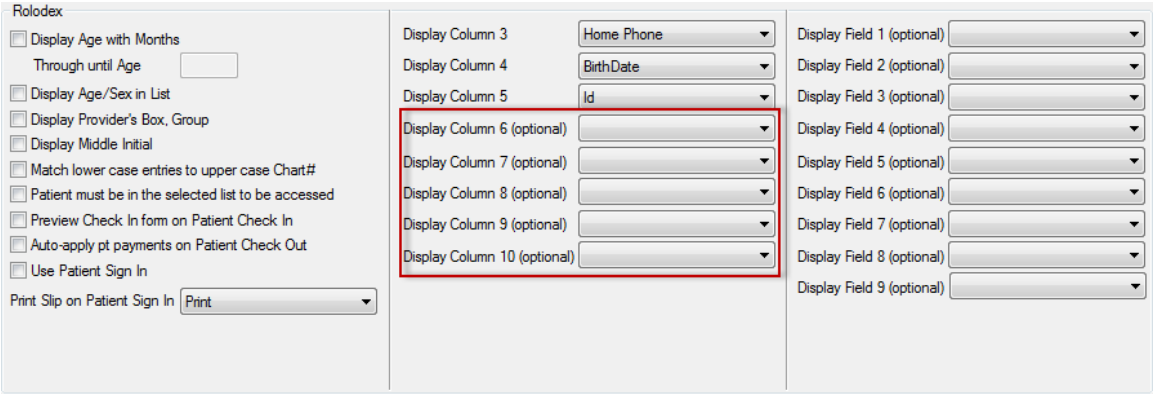
123849 - New optional display column

Module: Rolodex ~ Patient Options window

Issue: Need the ability to show additional patient information in the Rolodex search list.

Also, when you resize the column width and run another search, axiUm resets the columns width to their default size. Need the ability to retain this width in subsequent searches.

Enhancement: Five optional display columns (Display Column 6 -10) have been added to the Patient Options window (changed), for a possible 10 display columns to show in the Rolodex search list.



Notes:

- These field names have changed from Optional Display Column to Display Column.
- Depending on your screen resolution, you may need to scroll the Rolodex window to the right to view these additional columns.

Also, when you run subsequent searches, axiUm retains the column width until you close the Rolodex module. The same change has been made to the following windows:

- EDI Claims window
- Personal Planner window
- Overdue Patients window
- Chart Tracker window
- Inventory window
- Dispensary window
- Lab Tracking window

X-Ray

136786 – Integration with DDX

Module: X-Ray

Issue: Need axiUm to interface with DDX (lab management software).

Enhancement: Now axiUm interfaces with DDX.

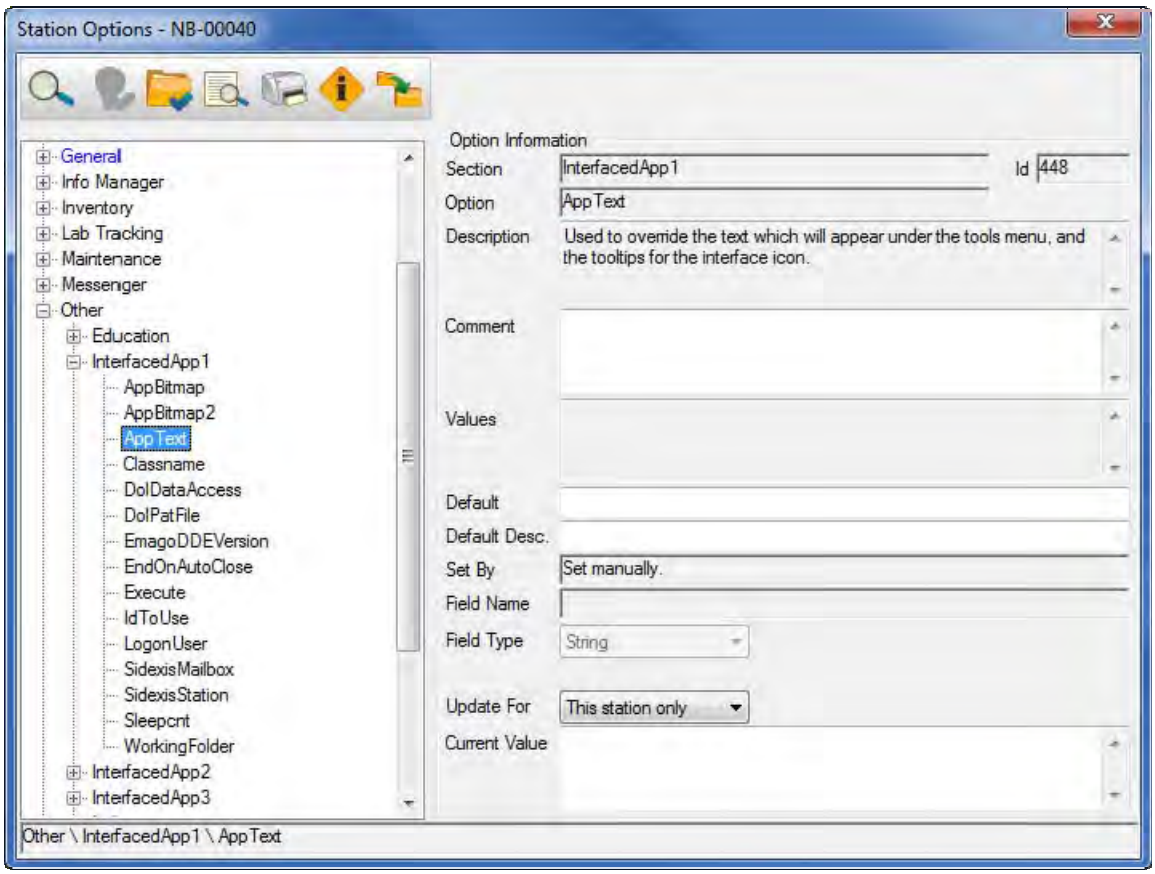
Note: This is not a two-way integration. It provides a quick method of launching the DDX program using the currently selected patient.

Setup:

1. Open the Station Options window.

   Go to the Maintenance module - System tab - Stations icon – Station Codes window - (Station Options).

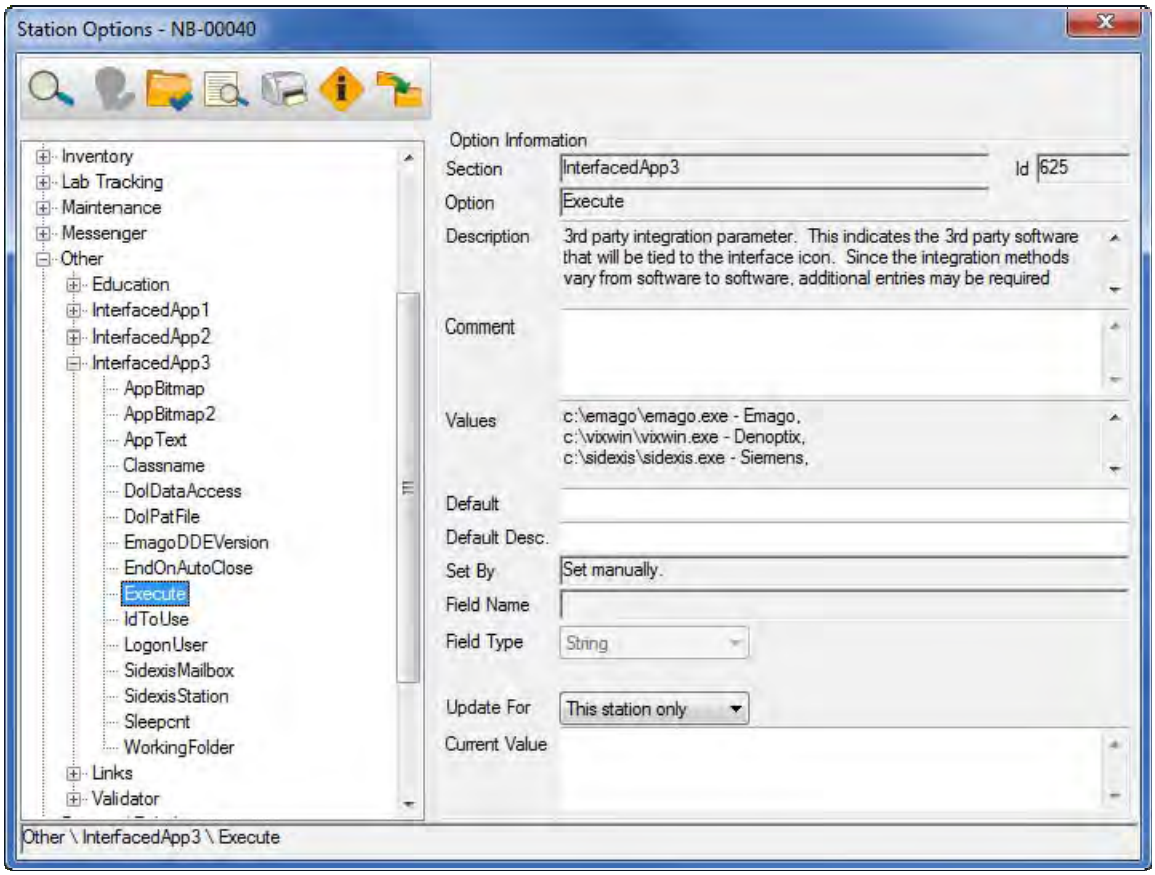
2. Go to Other section – InterfacedApp1 section – AppText item (new).



3. In the Current Value field, enter DDX Lab.

   This is the label to display for the DDX application.

4. Go to Other section – InterfacedApp1 section – Execute item (new).



5. In the Current Value field, enter
   `DDXLAB:https://www.ddxstaging.com/practice_portal/case_new`

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

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

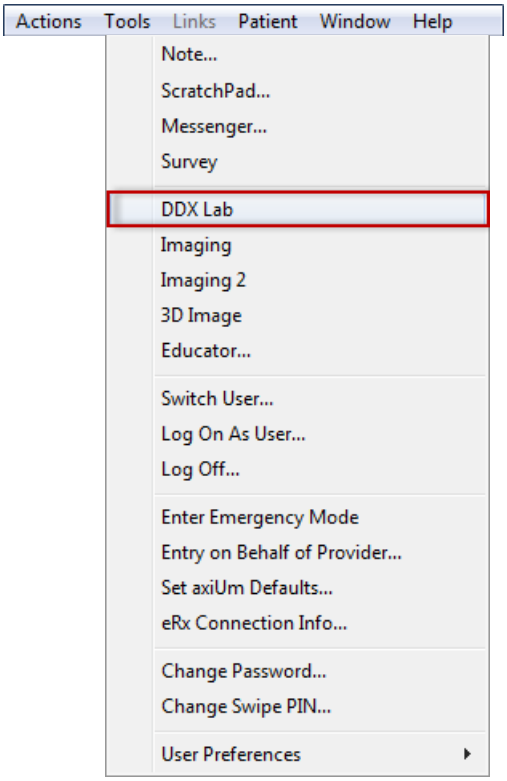
8. Close and restart axiUm.

Usage:

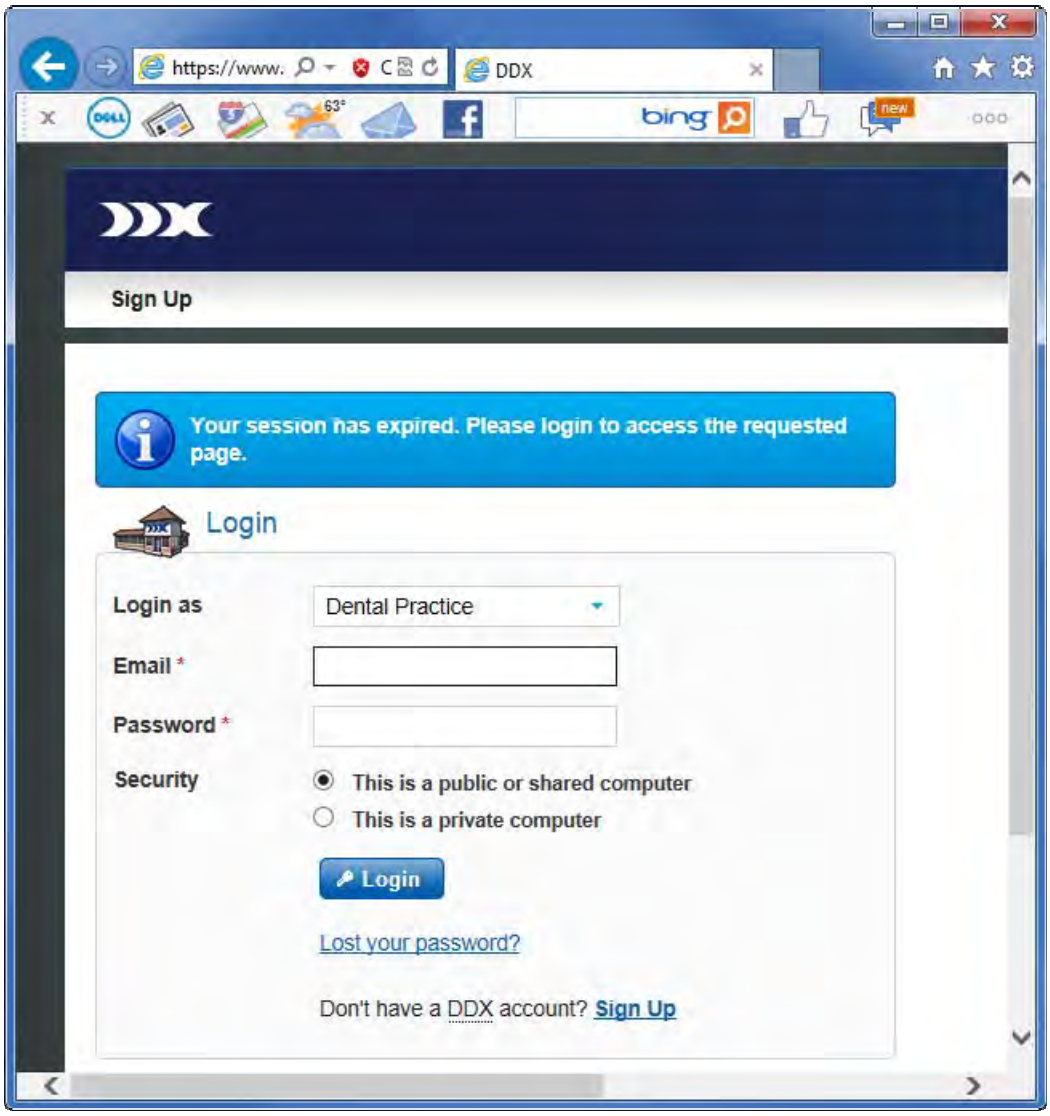
When axiUm opens, you will see the DDX bridge in the following areas of the application:

- The desktop icon.
  When you hover over the icon, axiUm displays the label we defined earlier (i.e. DDX Lab).

- The Tool menu.
  In the menu options, axiUm displays the label we defined earlier (i.e. DDX Lab).



When you launch this application, axiUm opens the DDX interface we set up earlier (i.e. DDXLAB:https://www.ddxstaging.com/practice_portal/case_new).



When the browser opens, enter your credentials to log on to DDX.

axiUm Release 5.20.02

EHR

139297 - Improvements to the "Entry on Behalf of Provider" feature

Module: EHR - Chart Add tab

Issue: When provider 1 enters on behalf of provider 2, the Expert sub-tab shows only those procedures accessible to provider 1. Because some procedures are not visible, provider 1 cannot select them on behalf of provider 2.

Granting provider 1 access to these procedures resolves this problem on the clinical side, but can create problems on the billing side. For example, to avoid billing certain procedures under certain providers, you must block these providers from accessing these procedures.

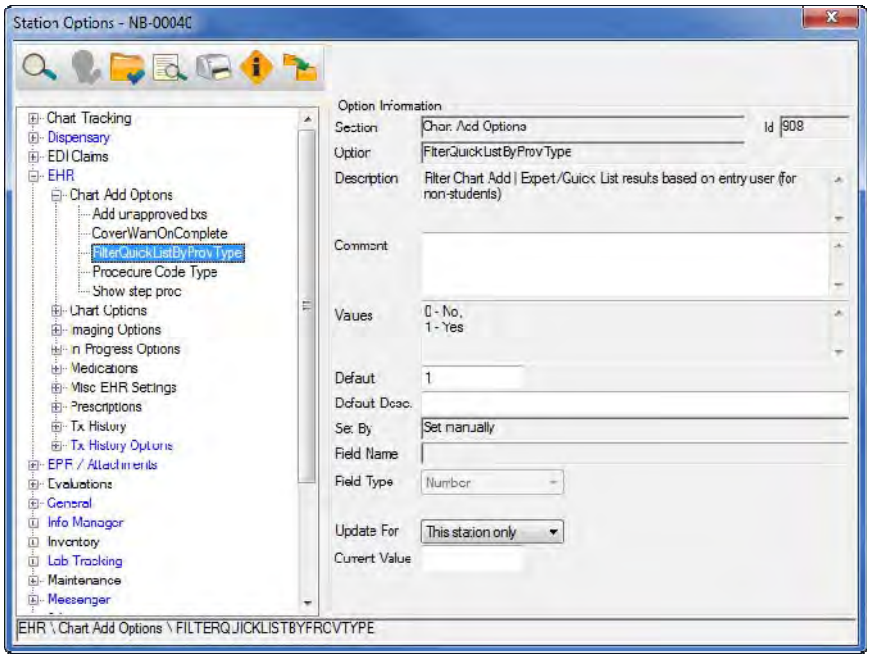
Enhancement: Now in the above scenario, the Expert tab displays procedures accessible to provider 2.

Setup:

1. Open the Station Options window.

   Go to the Maintenance window - System tab - Stations icon - Station Codes window - (Station Options).

2. Go to EHR section - Chart Add Options section - FilterQuickListByProvType item (new).



   0 = No: axiUm holds filtering until you click the Add button.

1 = Yes: axiUm applies the quick list filter based on the logged-on provider or the “on behalf of” provider.

Messenger

139990 – New date range filter

Module: Messenger

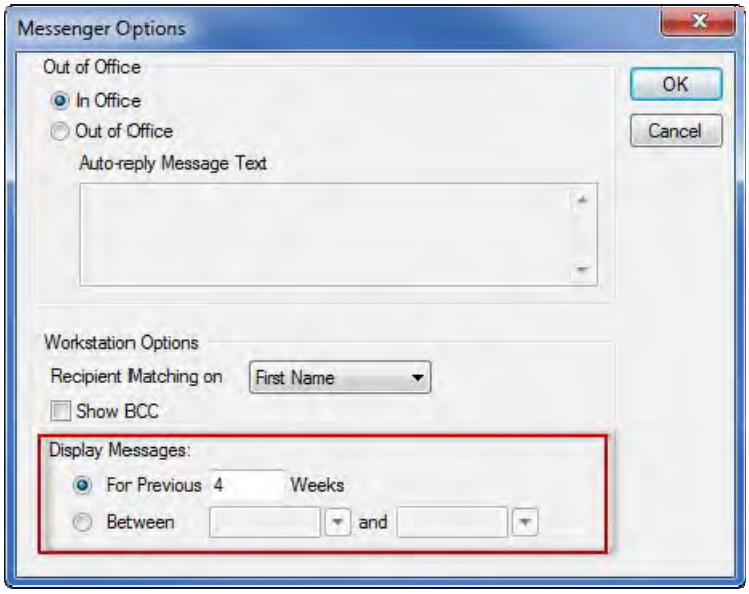
Issue: Need the ability to filter messages so that loading time will be reduced when opening the Messenger module

Enhancement: The Messenger now has the ability to filter messages by Date Range or Previous number of Weeks.

Setup for Messenger Behavior:

1. Open the Messenger Options window.

   Go to Messenger module - (Options/Settings).



2. Go to the Display Messages section (new).

   The following fields are new:

   - **For Previous __ Weeks** (new): This field defaults to 4.

- **Between __ and __** (new): These field indicate a date range. axiUm displays only those messages where activity occurred within these dates. These fields, if left blank, will display all messages. Note that the Inbox will indicate the *total* number of messages, not the number of messages *displayed*. If there is a discrepancy between the total number

and the number displayed, it is an indication to the user that there are messages that are not displayed.

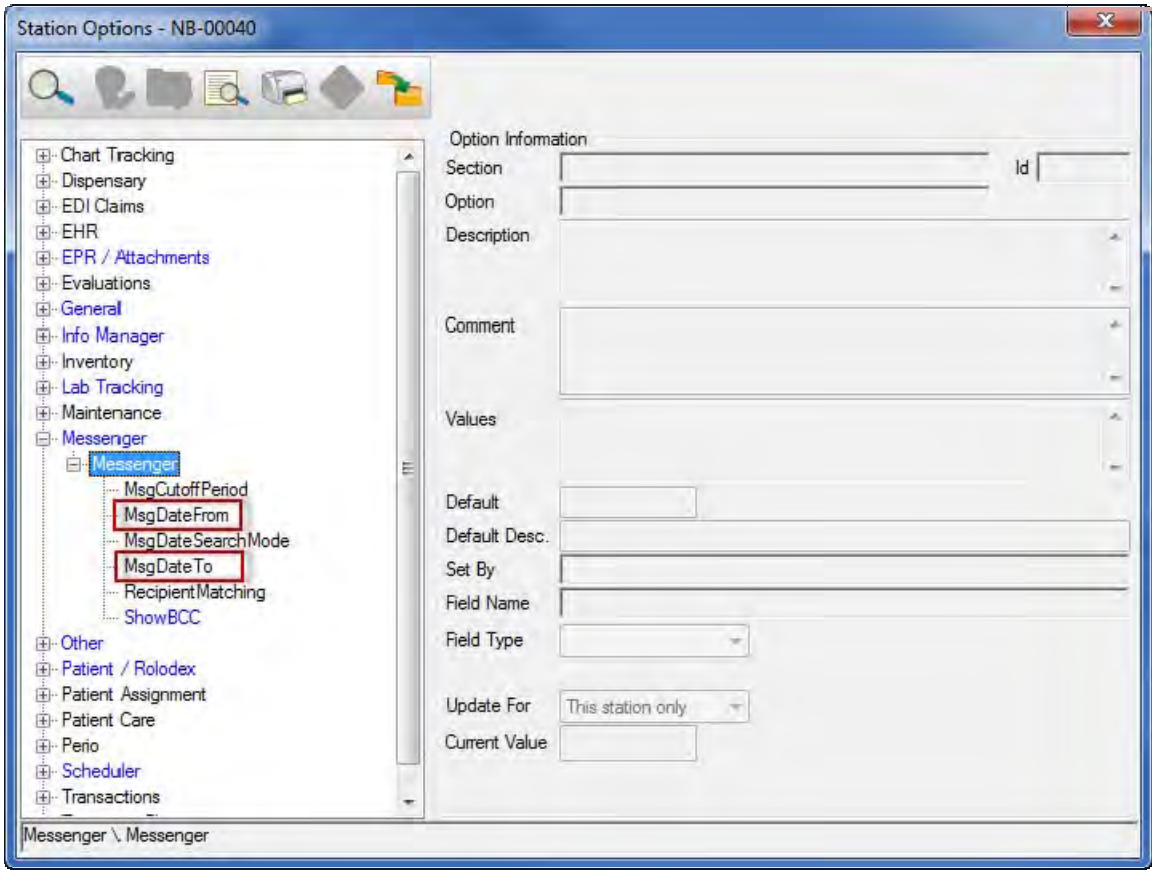
Setup for Messenger Defaults:

1. Open the Station Options window.

   Go to the Maintenance module - System tab - Stations icon – Station Codes window - (Station Options).

2. Go to the Messenger section – Messenger section.
   The following items are new:

   - MsgCUtoffPeriod itrm (new)
   - MsgDateFrom item (new)
   - MsgDateTo item (new)
   - MsgDateSearchMode item (new)



3. In MsgDateSearchMode, in the Current Value field, enter 0 if you would like the Messenger to default based on the number of weeks past, or enter 1 if you would like the Messenger to load messages based on a date range.

For example, if you enter 1, then when the Messenger opens, it will display all messages based on the dates entered in the MsgDateFrom and MsgDateTo fields. If the ‘from’ and ‘to’ fields are left blank, the Messenger will load all messages.

4. In the Current Value field for MsgCutoffPeriod enter the number of weeks past that the Messenger should default to.

   For example, if you want messages from the past 2 weeks to be loaded, enter 2. Note that the default is 4 weeks

5. In the Current Value fields for MsgDateFrom and MsgDateTo, enter the date defaults to use in the Messenger.

   The format to use is: YYYYMMDD.

Usage:

When you open the Messenger Options window, the Display Messages section will be set according to the defaults set in Station Options and the list of messages will be displayed based on these options.

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axiUm Release 5.20.03

EHR

136780 – Ability to control the display behavior of pop-up

Module: EHR ~ Treatment Plan window

Issue: When you highlight a record, axiUm automatically displays the additional information pop-up window. This pop-up often hides information in the records behind it. Need to improve the display of this pop-up.

Enhancement: Now pressing the spacebar toggles between showing and hiding the additional information pop-up, giving you the option to display it only when you want to view it. In addition to this behavior, the following changes have been made:

- Diagnosis tab: When you press the spacebar, axiUm displays the pop-up window, but only when all of the following conditions are met:
    - A problem is associated to the selected diagnosis record.
    - The Row per Problem right-click option is deselected.
- Treatment plan options: When you press the spacebar, axiUm displays the pop-up window regardless of whether the Row per Problem right-click option is selected.
- Patient Approvals window: When you press the spacebar, axiUm displays the pop-up window, but only if the highlighted treatment record has one or more diagnoses associated to it.