

# Revised 7-24-06 **AxiUm Training**

**University of Kentucky  
College of Dentistry**

**Payment Plans**



# Welcome

- Why AxiUm? (from Overview)
- Trainers: Keith Shelton and JoAnn Lowery
- Training on preparing new payment plans and making changes on plans
- Class is 1 hour so we won't have a break. Handouts will be in the notebook.
- You may ask questions as we are doing the demonstration. We will give time to practice after the demonstration.



## Why AxiUm:

- Path to electronic patient record
- Used in 24 other U.S. dental schools
- Provides greater educational exposure for students and residents.
- State-of-the-art Technology for staff , faculty students/residents recruiting
- Increased efficiency
- Improved reporting
- More user-friendly
- EPR will permit view all patient encounters across clinics.

## Before You Begin...

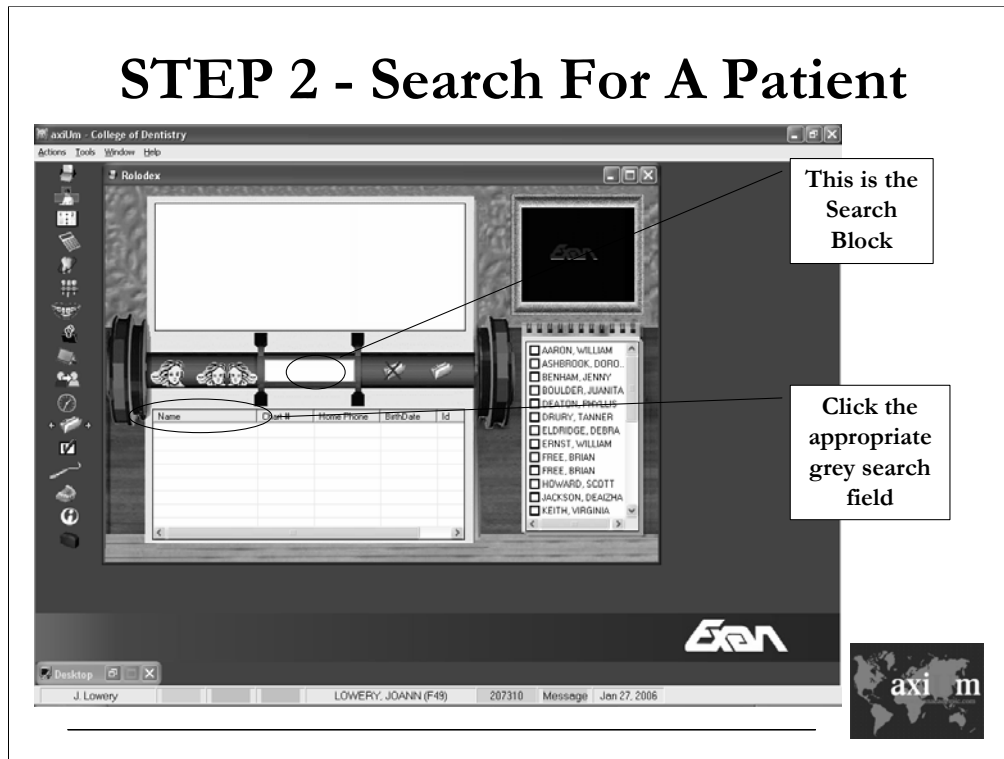
- If balance exists and is to be included in payment plan, plan must be set up as a plan for future (specific) charges. You may have one plan for future treatment or one plan for outstanding balance, but not both. You may have an ortho payment plan along with one of the above.
- To prepare a payment plan, follow the steps listed below:

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Choose **Rolodex** icon from main screen.



To start a search, type search criteria in the **Search Block**.

Searches may be by patient name (by maiden name also), Chart #, Social Security Number or birthdate. If patient is located after first search, continue to step 3.

Name – Search in this order: Patient last name, first name (no space); Patient last name, Patient maiden name (no space)

To search using both names, type a maximum of 3-4 characters of the patient last name, a comma, then 3-4 characters of the first name

After entering name, click the grey “Name” box on the bottom part of the screen

Chart # - To search by chart # enter chart number and click the grey “Chart #” box

Social Security # -To search by social security #, enter SSN without dashes and click the grey “ID” box

Date of Birth – To search by date of birth, enter patient date of birth in MM/DD/YY format (including slashes) and click the grey “BirthDate” box

## SELECTING PATIENT TO ACTIVE LIST

**ACTIVE LIST**

This is the Patient Card button

Double click to move to Active List

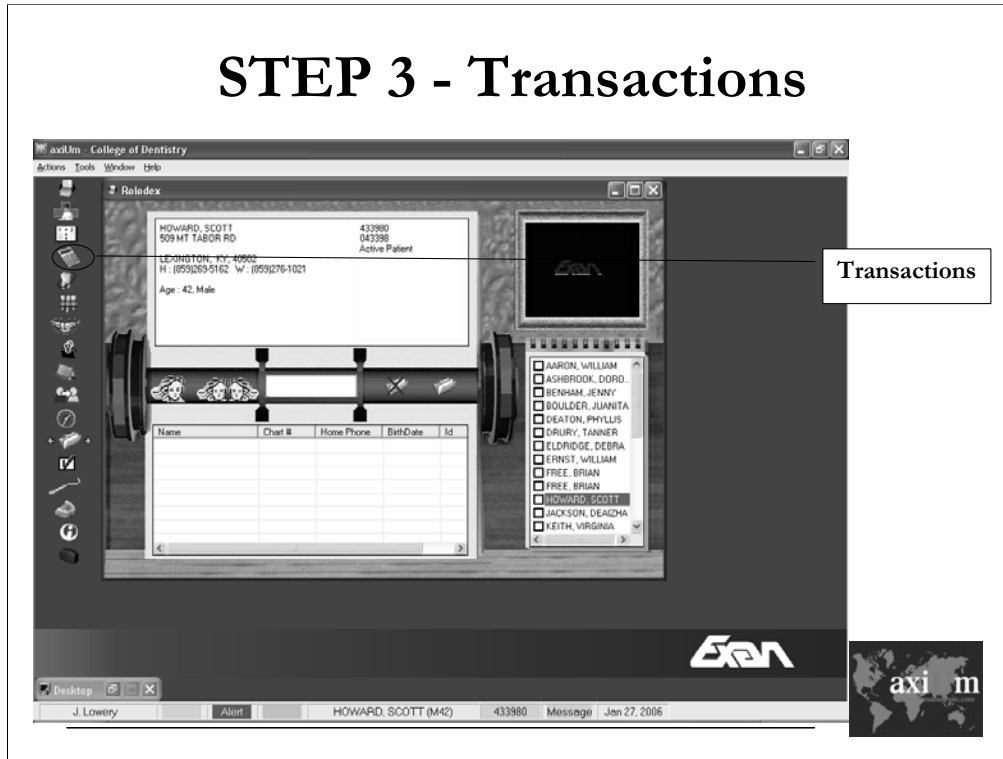
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After locating patient, select the patient by double-clicking patient name to **Active List**

Access the **Patient Card** to confirm existing data (preferred name, date of birth, phone number, address, responsible party, insurance information)

To access the **Patient Card**, select the patient by clicking on the name in the **Active List** then click the **Patient Card** icon

# STEP 3 - Transactions



Choose **Transactions** (\$) from the icons on your desktop.

## STEP 4 – Type of Payment Plan

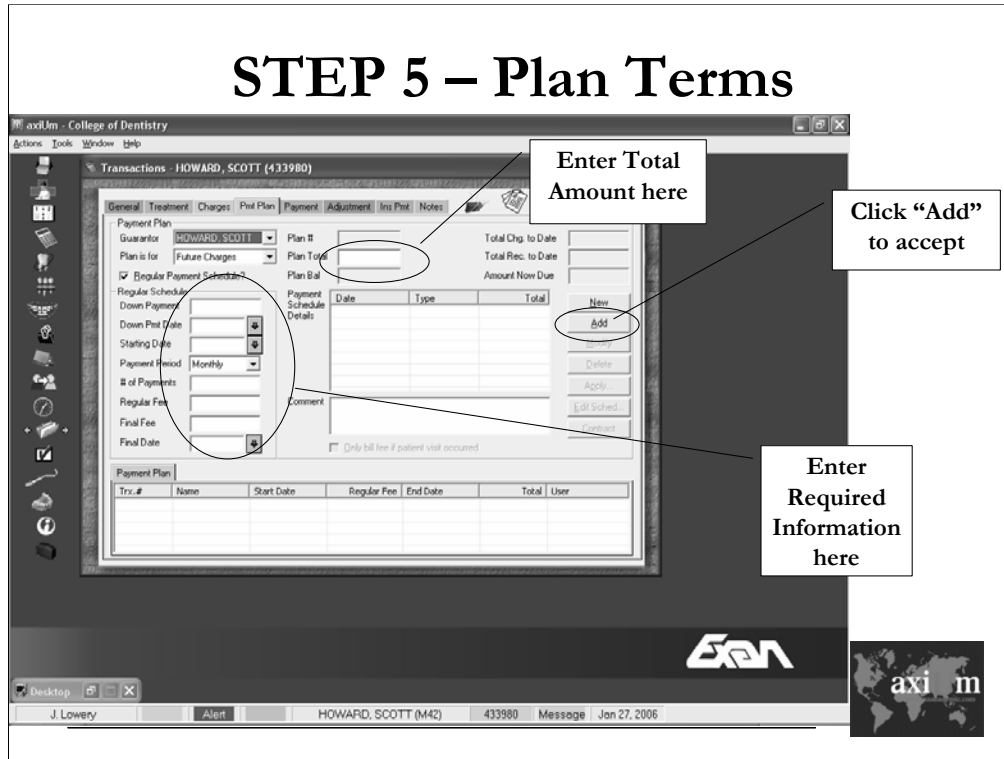
The screenshot shows the 'axiUm - College of Dentistry' application window. The 'Transactions - HOWARD, SCOTT (433980)' window is open, displaying the 'Payment Plan' tab. The 'Plan is for' dropdown menu is set to 'Future Charges'. A callout box labeled 'Payment Plan Tab' points to the 'Pmt Plan' tab in the window's title bar. Another callout box labeled 'Select Type of Payment Plan here' points to the 'Plan is for' dropdown menu. The interface includes fields for 'Plan #', 'Plan Total', 'Plan Bal', 'Regular Schedule', 'Down Payment', 'Down Pmt Date', 'Starting Date', 'Payment Period', 'Regular Fee', 'Final Fee', and 'Final Date'. A 'Payment Schedule Details' table is also visible.

Check to make sure you have your patient listed.

Click on the **Pmt Plan** tab.

When you click on pmt plan tab, this will open an additional window.

Choose future (specific) treatment, outstanding balance, or orthodontic plan from the “Plan is for” drop down box.



Enter the **total plan amount**.

Enter the amount of **down payment**, following the established policy for the payment plan (example: student treatment, 10% down of phase 1, 20% down of phase 2).

Enter the **date** the down payment is due, using 2 digits for the month, 2 digits for the day, and 2 digits for the year (you may use the calendar if you prefer).

Enter the **date of the expected monthly payment** (use the 25th of each month as the date for student treatment).

Payment schedule defaults to monthly.

Enter the **number of monthly payments**. This will automatically populate the regular fee (amount of monthly payment), final fee (last monthly payment), and the final payment due date.

Click **Add** to accept this payment plan.

# Finalize

The screenshot displays the 'axiUm - College of Dentistry' application window. The main window title is 'Transactions - HOWARD, SCOTT (433980)'. The 'Payment Plan' tab is selected, showing the following details:

- Guarantor: HOWARD, SCOTT
- Plan #: 2481
- Plan Total: 2000.00
- Plan Bal: 1800.00
- Regular Payment Schedule?
- Down Payment: 200.00
- Down Pmt Date: 01/27/2006
- Starting Date: 02/27/2006
- Payment Period: Monthly
- # of Payments: 12
- Regular Fee: 150.00
- Final Fee: 150.00
- Final Date: 12/27/2006

The 'Payment Schedule Details' table is as follows:

Date	Type	Total
01/27/2006	Down Pmt	200.00
02/27/2006	Regular	150.00
03/27/2006	Regular	150.00
04/27/2006	Regular	150.00
05/27/2006	Regular	150.00
06/27/2006	Regular	150.00
07/27/2006	Regular	150.00

The 'Payment Plan' table at the bottom shows:

Trx.#	Name	Start Date	Regular Fee	End Date	Total	User
2481	SCOTT	02/27/2006	150.00	12/27/2006	2000.00	J. Lowery

Callouts in the image indicate that the 'Plan #' field (2481) is the 'Plan Number' and that the 'Contract' button is used to 'Click to view Contract'.

When plan is accepted, a **plan number** will be assigned to the payment plan. A list of all payments due and the date will be listed

Click on the **contract** button to print the contract. Choose the printer to print and click ok. This will print to the appropriate printer. This will list the amount of the expected down payment and the monthly payments.

# Schedule of Payments

The screenshot shows the 'axiUm - College of Dentistry' application window. The main window is titled 'Transactions - HOWARD, SCOTT (433980)'. It has a menu bar with 'Actions', 'Tools', 'Window', and 'Help'. The interface is divided into several sections:

- Payment Plan Summary:** Guarantor: HOWARD, SCOTT; Plan #: 2481; Plan Total: 2000.00; Total Chg. to Date: 2000.00; Total Rec. to Date: 0.00; Plan Bal: 2000.00; Amount Now Due: 2000.00.
- Regular Schedule:** Down Payment: 200.00; Down Pmt Date: 01/27/2006; Starting Date: 02/27/2006; Payment Period: Monthly; # of Payments: 12; Regular Fee: 150.00; Final Fee: 150.00; Final Date: 12/27/2006.
- Payment Schedule Details (Circled):**

Date	Type	Total
01/27/2006	Down Pmt	200.00
02/27/2006	Regular	150.00
03/27/2006	Regular	150.00
04/27/2006	Regular	150.00
05/27/2006	Regular	150.00
06/27/2006	Regular	150.00
07/27/2006	Regular	150.00
- Payment Plan Table:**

Trx.#	Name	Start Date	Regular Fee	End Date	Total	User
2481	SCOTT	02/27/2006	150.00	12/27/2006	2000.00	J. Lowery



# Applying treatment to the payment plan

axiUm - College of Dentistry  
 Transactions - HOWARD, SCOTT (433980)

Payment Plan

Guarantor: HOWARD, SCOTT Plan #: 2481 Total Chg. to Date: 200.00  
 Plan is for: Future Charges Plan Total: 2000.00 Total Rec. to Date: 0.00  
 Plan Bal: 1800.00 Amount Now Due: 200.00

Regular Schedule

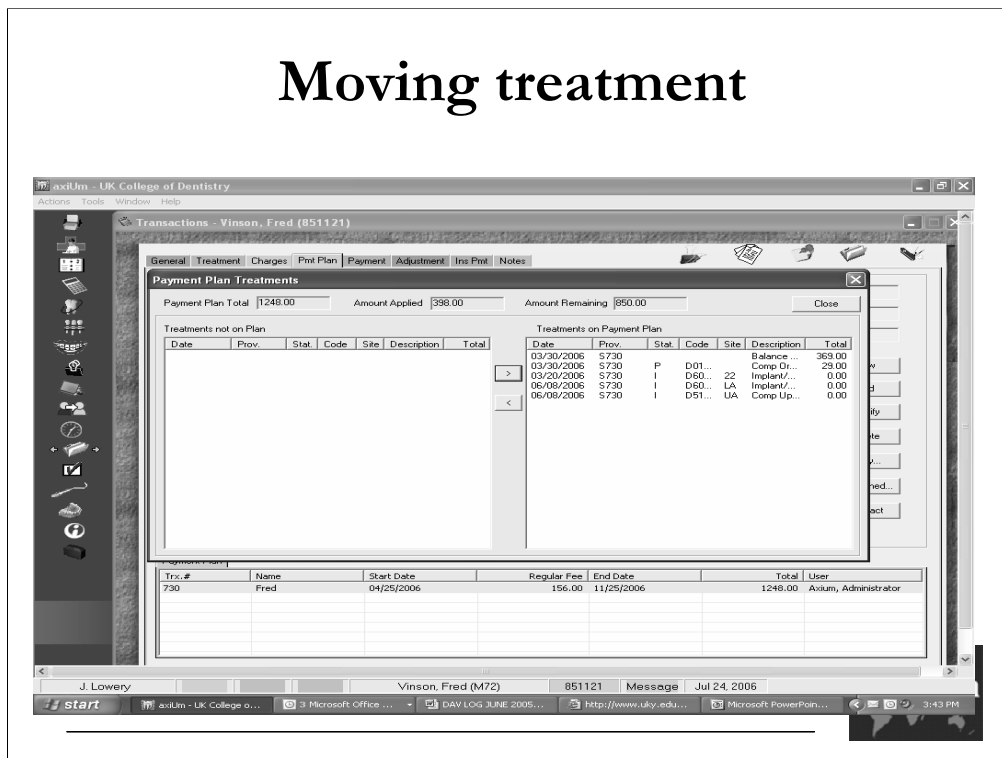
Date	Type	Total
01/27/2006	Down Pmt	200.00
02/27/2006	Regular	150.00
03/27/2006	Regular	150.00
04/27/2006	Regular	150.00
05/27/2006	Regular	150.00
06/27/2006	Regular	150.00
07/27/2006	Regular	150.00

Payment Plan Table:

Trx. #	Name	Start Date	Regular Fee	End Date	Total	User
2481	SCOTT	02/27/2006	150.00	12/27/2006	2000.00	J. Lowery

Hi-light the payment plan. Then click on the apply button to move treatment that is included in the payment plan. This will open another screen.

# Moving treatment



All treatment will be listed on the treatment not on plan (left side). Use the right arrow button on the screen to move included treatment to the right (treatments on payment plan). Click the close button after the treatment has been moved.

# Modify Treatment Plan

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Transactions - HOWARD, SCOTT (433980)

Payment Plan

Guarantor: HOWARD, SCOTT Plan #: 2481 Total Chg. to Date: 200.00

Plan is for: Future Charges Plan Total: 2000.00 Total Rec. to Date: 0.00

Plan Bal: 1800.00 Amount Now Due: 200.00

Regular Schedule

Down Payment: 200.00

Down Pmt Date: 01/27/2006

Starting Date: 02/27/2006

Payment Period: Monthly

# of Payments: 12

Regular Fee: 150.00

Final Fee: 150.00

Final Date: 12/27/2006

Payment Schedule Details:

Date	Type	Total
01/27/2006	Down Pmt	200.00
02/27/2006	Regular	150.00
03/27/2006	Regular	150.00
04/27/2006	Regular	150.00
05/27/2006	Regular	150.00
06/27/2006	Regular	150.00
07/27/2006	Regular	150.00

Payment Plan

Trx. #	Name	Start Date	Regular Fee	End Date	Total	User
2481	SCOTT	02/27/2006	150.00	12/27/2006	2000.00	J. Lowery

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Use the modify treatment button to change a plan total while keeping the payments the same. You may also use this to add comments.

If you are making other changes, you must use the edit schedule button.

# Edit Schedule

axiUm - College of Dentistry  
Actions Tools Window Help

Transactions - HOWARD, SCOTT (433980)

General Treatment Charges Pmt Plan Payment Adjustment Ins Pmt Notes

Payment Plan  
Guarantor: HOWARD, SCOTT Plan #: 2481 Total Chg. to Date: 200.00  
Plan is for: Future Charges Plan Total: 2000.00 Total Rec. to Date: 0.00  
Plan Bal: 1800.00 Amount Now Due: 200.00

Regular Payment Schedule?

Regular Schedule  
Down Payment: 200.00  
Down Pmt Date: 01/27/2006  
Starting Date: 02/27/2006  
Payment Period: Monthly  
# of Payments: 12  
Regular Fee: 150.00  
Final Fee: 150.00  
Final Date: 12/27/2006

Payment Schedule Details

Date	Type	Total
01/27/2006	Down Pmt	200.00
02/27/2006	Regular	150.00
03/27/2006	Regular	150.00
04/27/2006	Regular	150.00
05/27/2006	Regular	150.00
06/27/2006	Regular	150.00
07/27/2006	Regular	150.00

Comment:  Only bill fee if patient visit occurred

Buttons: New, Add, Modify, Delete, Apply..., Contract

Payment Plan

Trx. #	Name	Start Date	Regular Fee	End Date	Total	User
2481	SCOTT	02/27/2006	150.00	12/27/2006	2000.00	J. Lowery

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This will open another screen.

## Edit Schedule Screen

### Edit Payment Plan Fees

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**Payment Plan Information**

Plan Id	2481	Plan Balance	1800.00
Plan Total	2000.00	Total of Fees	2000.00

**Fee Item Details**

Item #	13	Date	<input type="text"/> <div style="border: 1px solid gray; width: 15px; height: 15px; text-align: center; font-size: 8px;">↓</div>	Claim Date	<input type="text"/> <div style="border: 1px solid gray; width: 15px; height: 15px; text-align: center; font-size: 8px;">↓</div>
Fee Type	Manual	Procedure	...		
Amount	<input type="text"/>	Ins. Amount	<input type="text"/>		

Item	Date	Type	Total
0	01/27/2006	Down Pmt	200.00
1	02/27/2006	Regular	150.00
2	03/27/2006	Regular	150.00
3	04/27/2006	Regular	150.00
4	05/27/2006	Regular	150.00
5	06/27/2006	Regular	150.00
6	07/27/2006	Regular	150.00
7	08/27/2006	Regular	150.00
8	09/27/2006	Regular	150.00
9	10/27/2006	Regular	150.00
10	11/27/2006	Regular	150.00
11	12/27/2006	Regular	150.00
12	12/27/2006	Final	150.00

You may then change the date a payment is due, the amount of down payment, etc. If you change amounts of payments, it must balance to the total when you are finished.

If additional treatment was added and the number of months need to extend, make the necessary changes. You must keep the number of months within the College of Dentistry's payment policy.

## Thank You

- Practice, get excited
- Feel free to repeat a training session
- Come to the refreshers
- Use the materials in the Notebook
- Contact Keith Shelton or JoAnn Lowery if you get stuck.

