ADMINISTRATOR OVERVIEW TRAINING MANUAL

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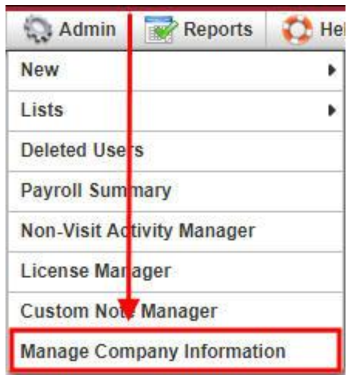
MANAGE COMPANY INFORMATION:

Admin/Manage Company Information



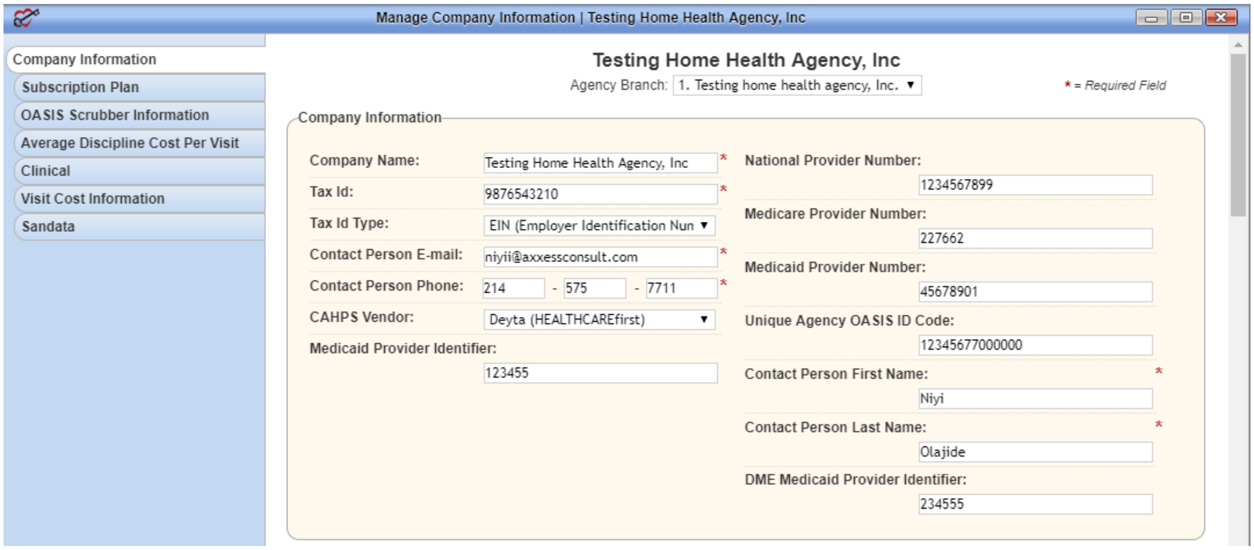
The following window opens and requires the signature of someone with the Administrator role in their user profile. After entering a signature, select the "Proceed" button.

NOTE: For updating Signature. See Office Overview.

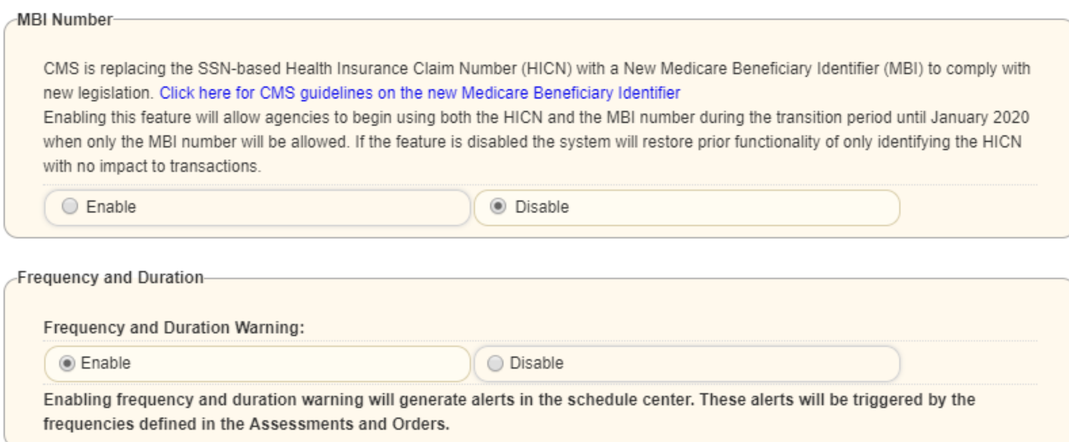
Manage Company Information is split up into 7 tabs found on the left side of the window

1. **Company Information** – Where you enter your agency's information. ID's and Provider Numbers are retrieved outside of Axxess.

NOTE: Anything with a red asterisk (*) means the information is required to save the page.



AgencyCore will accept MBI Numbers. This is a setting that must be enabled to use. Default is "Disable." Alerts can be enabled in the Schedule Center based on frequency and duration according to previously entered orders and assessment answers. Default is "Disable."

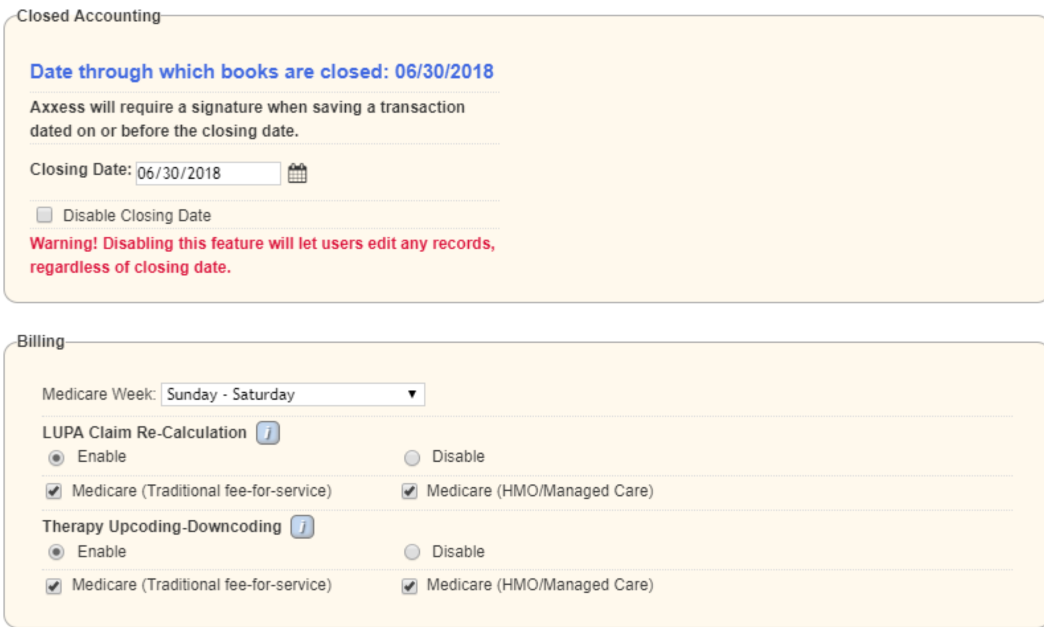


The agency must decide the date that books are closed by selecting a date on the calendar. A signature will be required for saving transactions dates on or before the closing date.

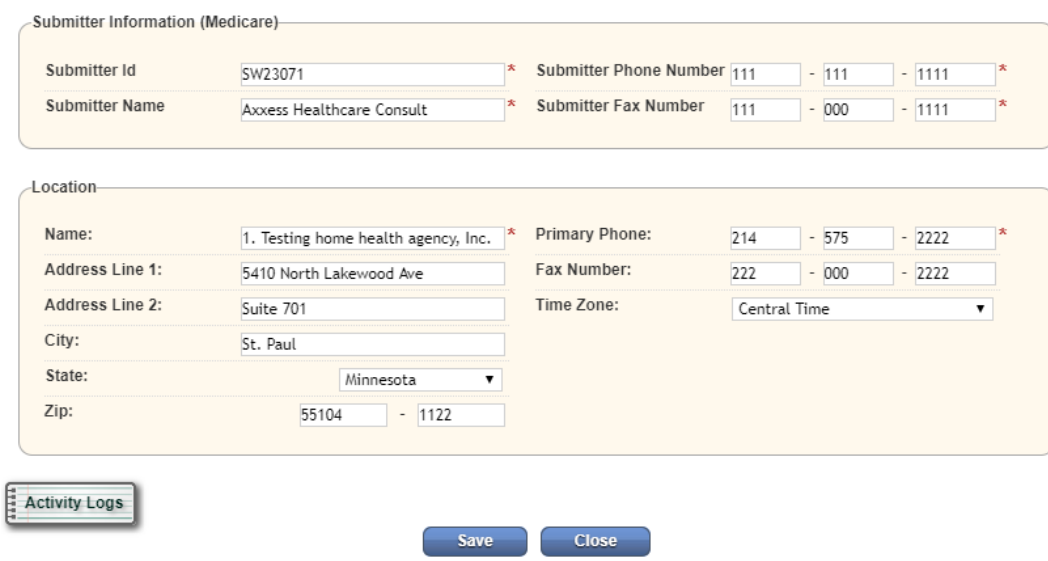
NOTE: If the "Disable Closing Date" check box is selected, users will be able to edit any records (permission-based) regardless of closing date.

Choose the Medicare Week from the drop-down. Default is Sunday-Saturday. Then users must decide if they would like "LUPA Claim Re-Calculation" and

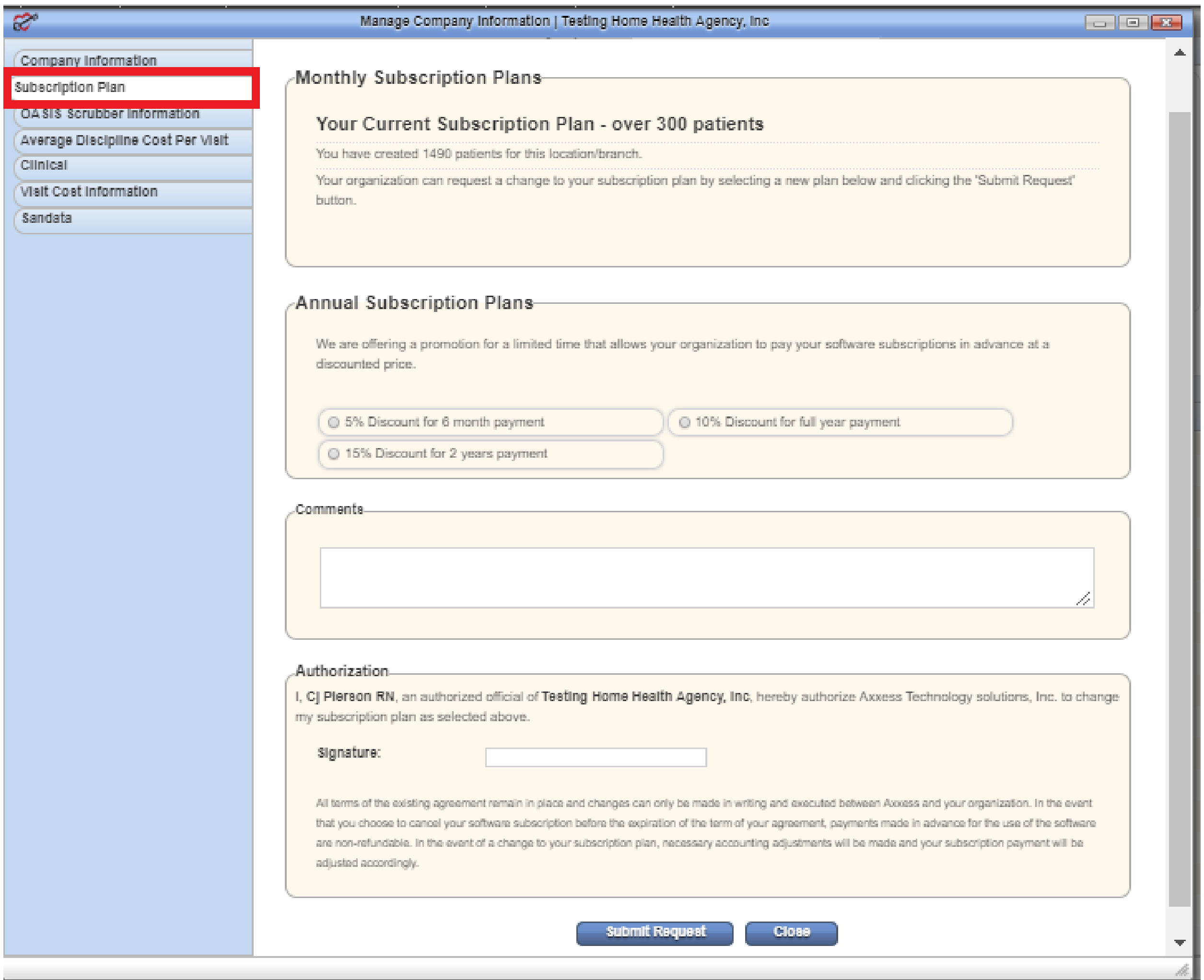
"Therapy Upcoding-Downcoding" to be enabled for traditional Medicare and/or HMO/Managed Care Medicare.



Once Submitter Information has been received from Medicare it should be entered (if claims are being downloaded) along with the address of the location tied to the Submitter Information. Selecting the "Activity Logs" button will open a new window showing which users have changed data in the Company Information tab, and when the change was made. Any changes made should be followed by selecting the "Save" button.

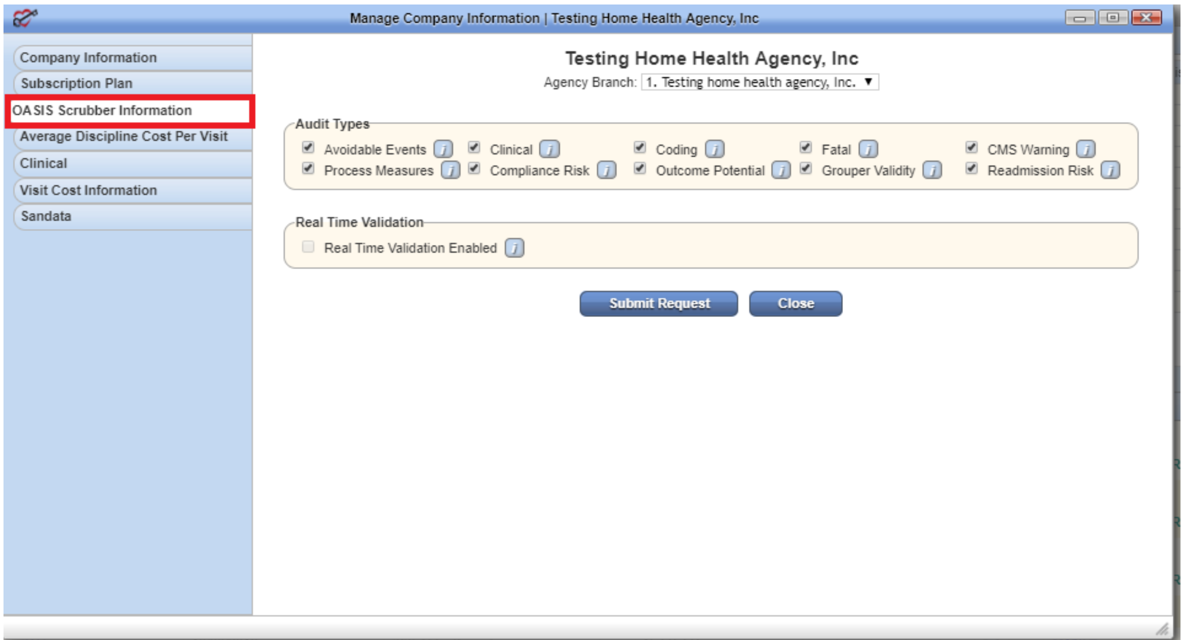


1. **Subscription Plan** – In this section, the current monthly subscription plan is shown. This plan is based on the number of users. Active Census can be adjusted by writing in a request in the Comments section, entering the users electronic signature and selecting the “Submit Request” button. Upgrading the Plan can only be done through the request from here. If users want to downgrade their plan, they must enter a ticket in the Support Ticketing Center.

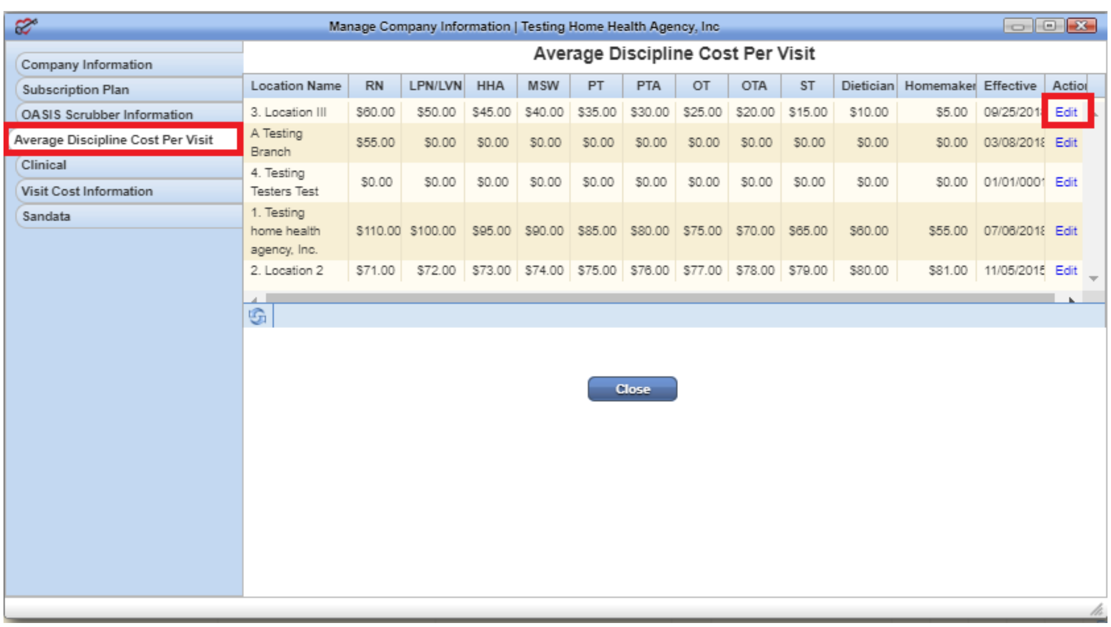


2. **OASIS Scrubber Information** – The agency has the option to check and uncheck specific Audit Types that the Axxess scrubber can look for when verifying OASIS visits. There is also an option to check the box to have this information validated in real time, rather than manually selecting the button to “Check For Errors.”

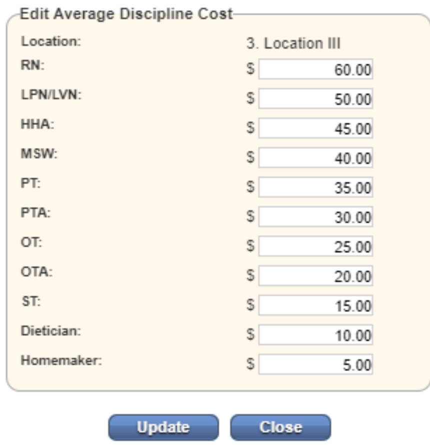
NOTE: Hovering over the *i* icon will give more insight into what each specific audit type is searching for.



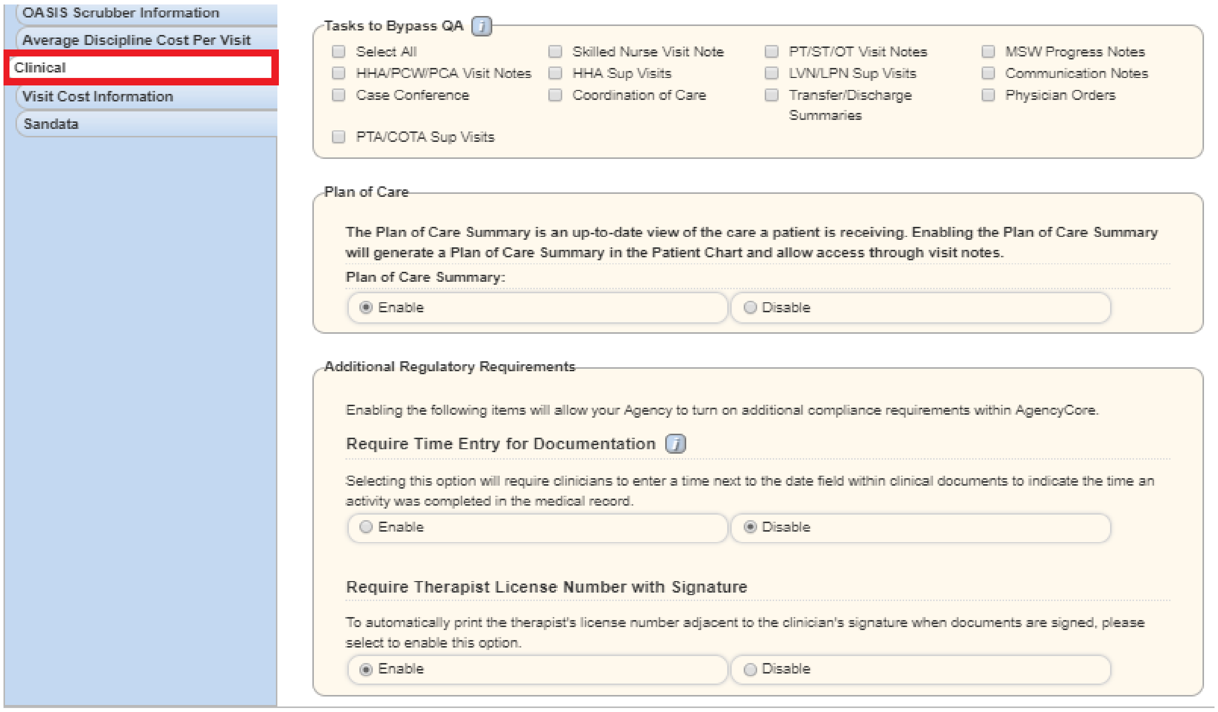
3. **Average Discipline Cost Per Visit** – This window allows users to enter an average the agency pays their workers per visit. Based off the location and discipline, the agency can decide the average cost per visit and its effective date.



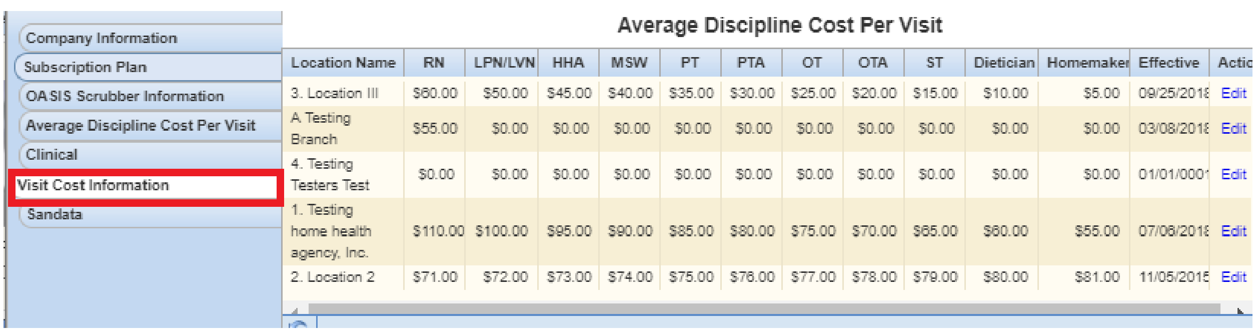
This can be edited by selecting the hyperlink “Edit” on the far right under the Actions column. Once all updates have been made, select the “Update” button to save.



4. **Clinical** – Choosing any of the Tasks to Bypass QA will cause all documents associated with the chosen task to bypass the QA center for all users. The default is none selected. The Plan of Care Summary generates a Plan of Care Summary in the Patient Chart. Default enabled. Additional Regulatory Requirements such as Time Entry for Documentation and Therapist License Number with Signature can be enabled or disabled. To save, select “Submit Request.”



5. **Visit Cost Information** – This allows agencies to enter the average costs of visits to their agency.

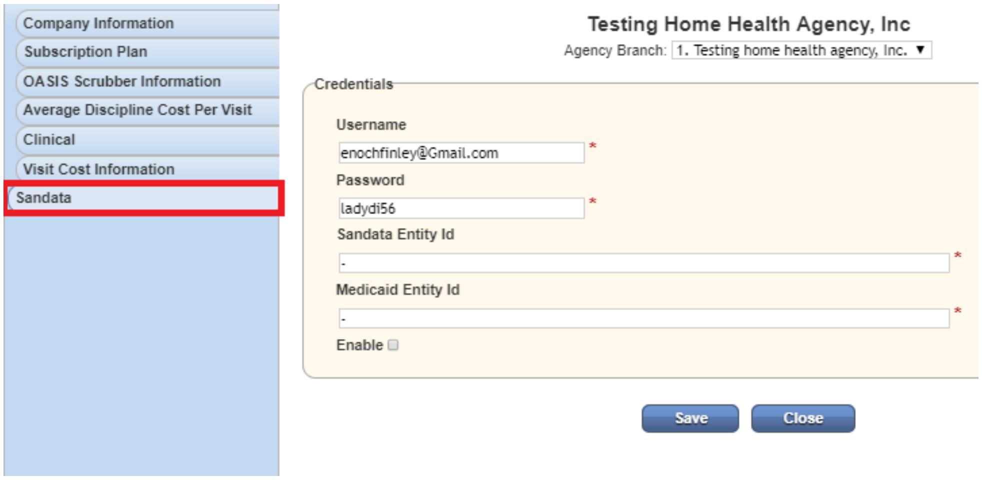


Average Discipline Cost Per Visit

Location Name	RN	LPN/LVN	HHA	MSW	PT	PTA	OT	OTA	ST	Dietician	Homemaker	Effective	Actio
3. Location III	$60.00	$50.00	$45.00	$40.00	$35.00	$30.00	$25.00	$20.00	$15.00	$10.00	$5.00	09/25/201	Edit
A Testing Branch	$55.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	03/08/201	Edit
4. Testing Testers Test	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	01/01/000	Edit
1. Testing home health agency, Inc.	$110.00	$100.00	$95.00	$90.00	$85.00	$80.00	$75.00	$70.00	$65.00	$60.00	$55.00	07/06/201	Edit
2. Location 2	$71.00	$72.00	$73.00	$74.00	$75.00	$76.00	$77.00	$78.00	$79.00	$80.00	$81.00	11/05/201	Edit

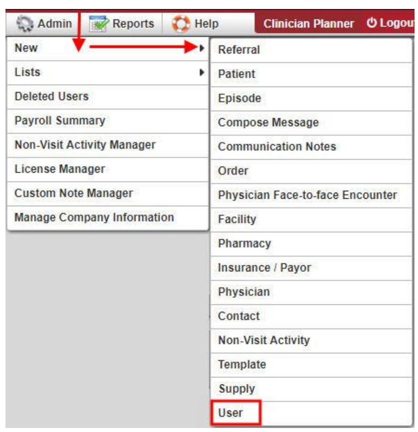
NOTE: Even though the formatting is the same as the Average Discipline tab, that tab is for workers while this tab is for agency costs.

6. **Sandata** – **FOR SELECT STATES ONLY** – Sandata is an Electronic Visit Verification (EVV) vendor that functions in select states. EVV is an electronic system that verifies when provider visits occur and documents the precise time services begin and end. The agency's Sandata (third-party vendor) information is entered in this tab. If the agency is planning on using a vendor other than Sandata, a notification must be entered to the Support Ticketing Center.

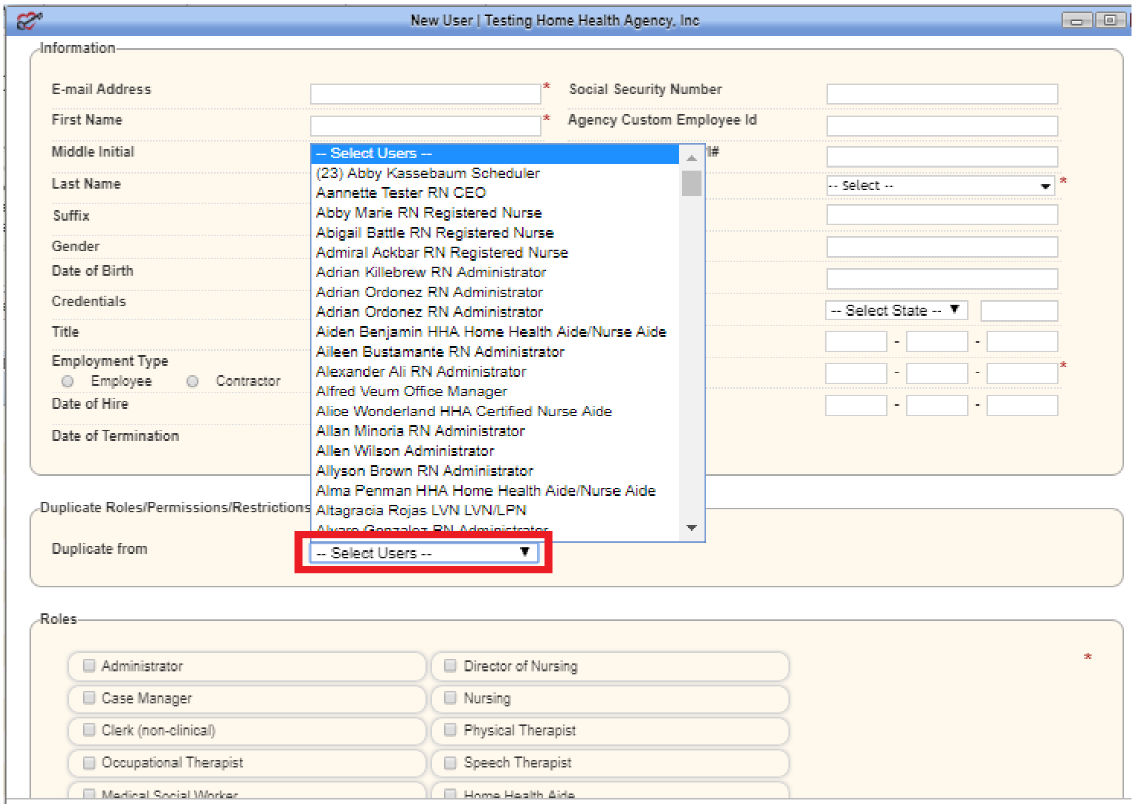


ADDING A NEW USER:

Admin/New/User



A window will open and the user's information must be entered. All asterisked items are required. The Roles, Permissions and Restrictions can be copied from a previously entered user using the "Duplicate from" drop-down menu. For example, if the agency is entering a new RN, a current on-staff RN can be selected that will have the same software access.



Roles are important in the software because they determine what a user can or cannot see, select, delete or undo.

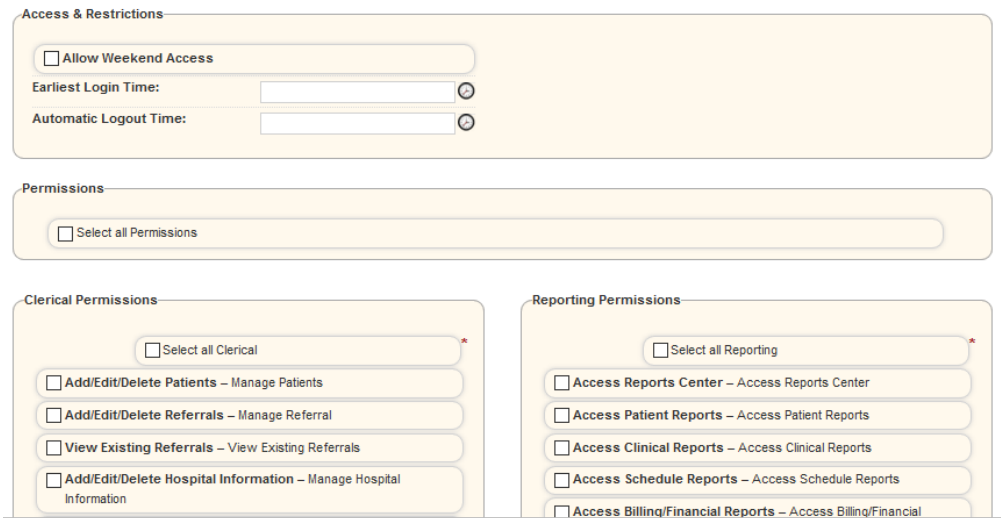
There is also a restriction function that will allow agencies to limit the times that users can be using the software. For example, if the “Allow Weekend Access” box is not checked and a user attempts to login on a Saturday, it will not allow entry.

Times can also be adjusted for the earliest time a user can login and/or when they are automatically logged out of AgencyCore.

Permissions will allow agencies to manually select which Clerical, Reporting, QA, Clinical, Billing, OASIS, Administration, Schedule Management and State Surveyor permissions they wish their users to have.

To save time, there is also a “Select all Permissions” check box that will check every single permission box below.

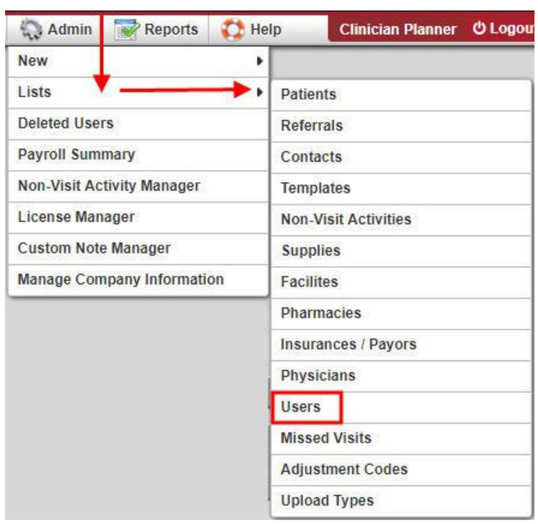
NOTE: Under Clinical Permissions – Agencies can only choose either Ability or Require check box for both Notes and Orders. If both are checked the user will not be able to do either.



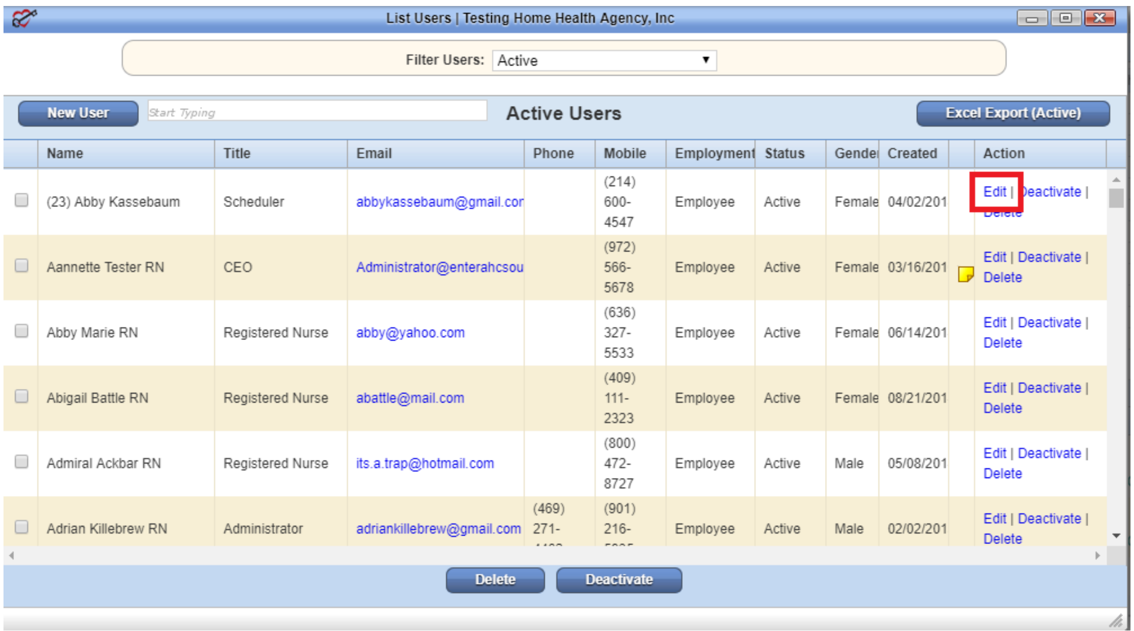
At the bottom of the window there is a free text space for any Comments related to the user. Once finished, select the “Add User” button to complete.

EDITING A USER:

Admin/Lists/Users

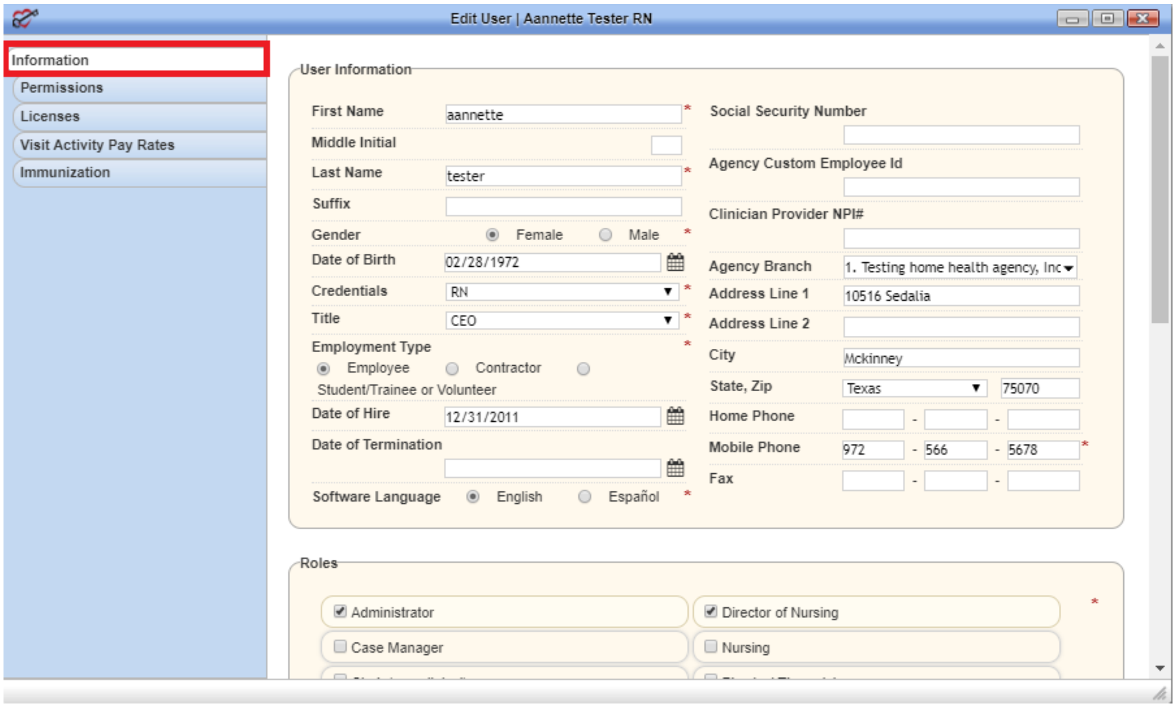


A window will open which will show a list of all current users. A new user can also be added from here selecting the “New User” button in the top left. Agencies can export the list of all users to an Excel spreadsheet by selecting the “Excel Export (Active)” button in the top right. The agency can “Deactivate” or “Delete” users individually by selecting on the hyperlinks to the far right under the Action column. The agency can also check the box(es) to the left of each employee name and “Delete” or “Deactivate” (buttons at the bottom) to remove multiple users at once. To edit a user, select the “Edit” hyperlink under the action column.



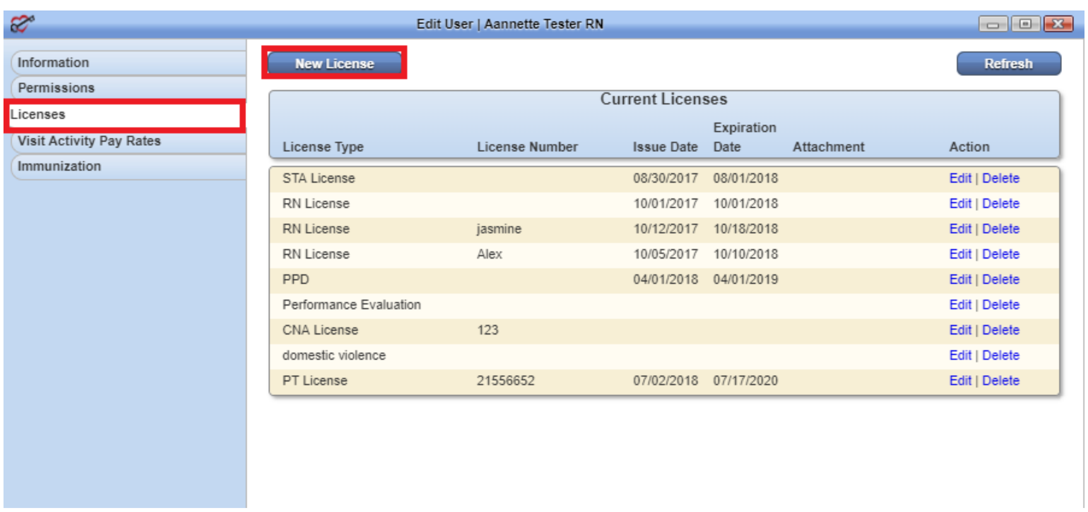
The Edit User window is split up into five tabs:

1. **Information** – The only difference between this screen and the previously mentioned User Information section is the option for the software to be in “English” or “Español” which is the last question in the section.

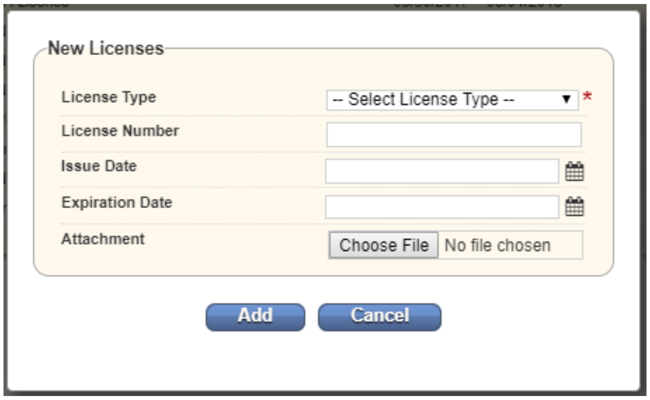


2. **Permissions** – *See adding a new user.*

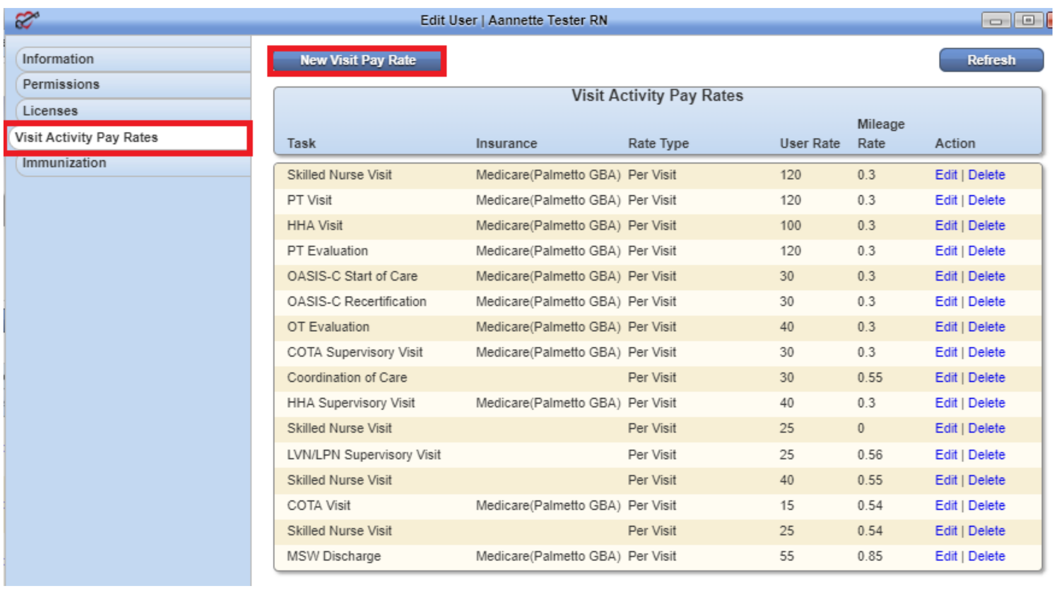
3. **Licenses** – Users licenses are maintained here, by either adding a new, editing a previous or deleting license information.



A window will open and license information is entered. Choose the “License Type” from the drop-down menu. Write in the License Number. Select from the calendar or write in the Issue and Expiration Dates. The agency can also add a scanned copy of any license by adding it as an attachment.

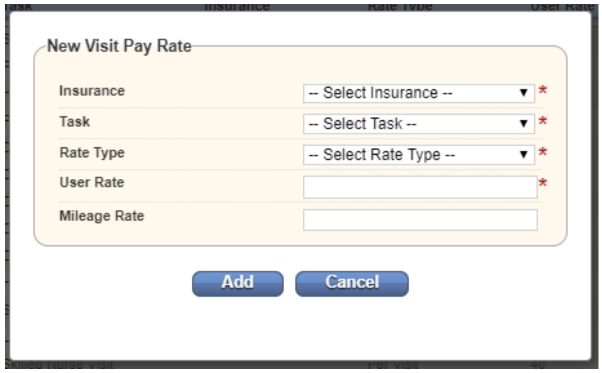


4. **Visit Activity Pay Rates** – If one of the users has a specific pay rate for visits, it can be added here by selecting the “New Visit Pay Rate” button in the top left.



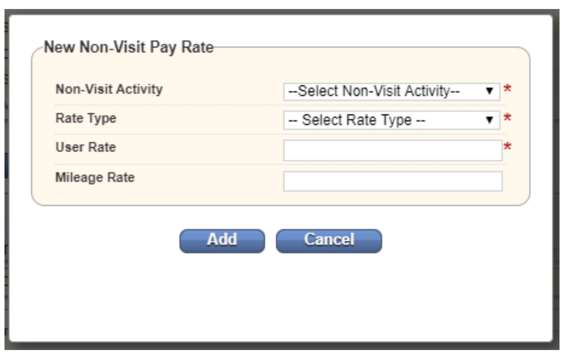
Task	Insurance	Rate Type	User Rate	Mileage Rate	Action
Skilled Nurse Visit	Medicare(Palmetto GBA)	Per Visit	120	0.3	Edit | Delete
PT Visit	Medicare(Palmetto GBA)	Per Visit	120	0.3	Edit | Delete
HHA Visit	Medicare(Palmetto GBA)	Per Visit	100	0.3	Edit | Delete
PT Evaluation	Medicare(Palmetto GBA)	Per Visit	120	0.3	Edit | Delete
OASIS-C Start of Care	Medicare(Palmetto GBA)	Per Visit	30	0.3	Edit | Delete
OASIS-C Recertification	Medicare(Palmetto GBA)	Per Visit	30	0.3	Edit | Delete
OT Evaluation	Medicare(Palmetto GBA)	Per Visit	40	0.3	Edit | Delete
COTA Supervisory Visit	Medicare(Palmetto GBA)	Per Visit	30	0.3	Edit | Delete
Coordination of Care		Per Visit	30	0.55	Edit | Delete
HHA Supervisory Visit	Medicare(Palmetto GBA)	Per Visit	40	0.3	Edit | Delete
Skilled Nurse Visit		Per Visit	25	0	Edit | Delete
LVN/LPN Supervisory Visit		Per Visit	25	0.56	Edit | Delete
Skilled Nurse Visit		Per Visit	40	0.55	Edit | Delete
COTA Visit	Medicare(Palmetto GBA)	Per Visit	15	0.54	Edit | Delete
Skilled Nurse Visit		Per Visit	25	0.54	Edit | Delete
MSW Discharge	Medicare(Palmetto GBA)	Per Visit	55	0.85	Edit | Delete

A new window will open, and the “Insurance, Task, Rate Type” must be chosen from their corresponding drop-down menus. A “User Rate” must then be added along with an optional “Mileage Rate.” Then select the “Add” button to save.



NOTE: Non-Visit Activities tasks needs to be created/added first. Go to *Admin/List/Non-Visit Activity* and create the activity types/task.

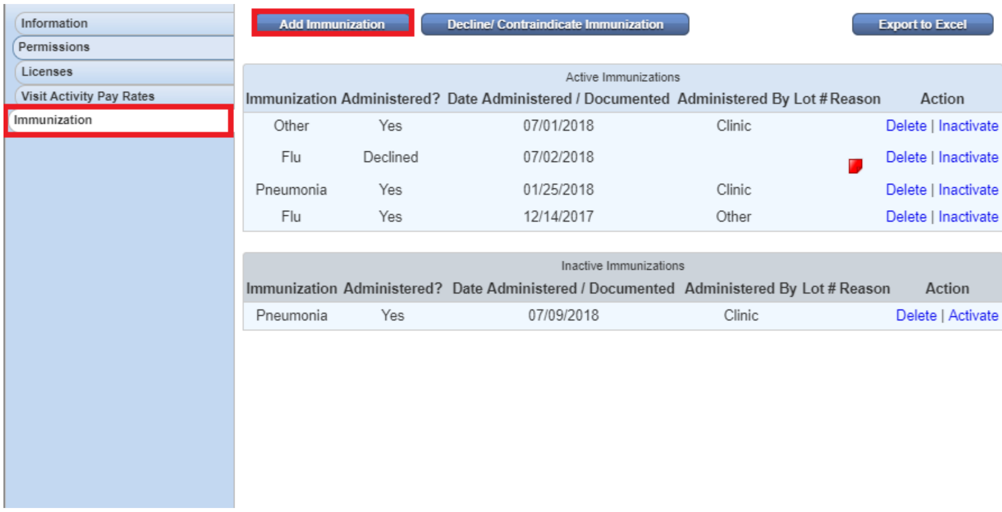
Below are the "Non-Visit Pay Rates" for documenting any expenses paid out to users that are not related to visits. Select the "New Non-Visit Pay Rate" button on the left side to add. A "Non-Visit Activity and Rate Type" must be chosen from their corresponding drop-down menus. A "User Rate" must be entered along with an optional "Mileage Rate." Select the "Add" button to save.



At the bottom of the tab, there is an option to "Import Pay Rates" which will let agencies copy pay rates set up for other users by simply selecting the "Duplicate Pay Rates from" drop-down menu. Then select the "Apply" button to the right.

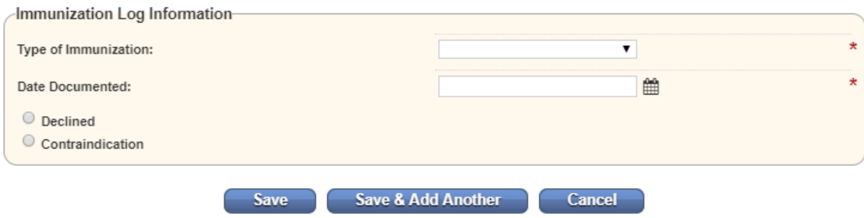
5. **Immunization** – This is where user immunizations are tracked. The list can be exported to an Excel spreadsheet by selecting the "Export to

Excel" button in the top right. To add an immunization, select the "Add Immunization" button in the top left.



A new window will open in which agencies must choose the "Type of Immunization" and who it was "Administered By" from their corresponding drop-down menus. Then select the "Date Administered" by writing in or selecting the date in the calendar. Agencies can "Save" this, or if there is more than one immunization to add, select the "Save & Add Another" to continue with another blank "Immunization Log Information" window.

It will then show up under the "Active Immunizations" section. If a user declines an immunization, it can also be added by selecting the "Decline/Contraindicate Immunization" button at the top of the page. It will open another log information window where the "Type of Immunization" must be chosen again. Either write in or select the date from the calendar. Then mark whether the immunization was "Declined" or "Contraindication." Agencies can "Save" this, or if there are more than one declined immunization to add, select the "Save & Add Another" to continue with another blank "Immunization Log Information" window.



Also, there is an option to “Delete” or “Inactivate” an immunization by selecting the hyperlinks in the far right under “Action.” Once an immunization is inactivated, it falls under the “Inactive Immunizations” section where it then can also be deleted or reactivated.

DELETED USERS:

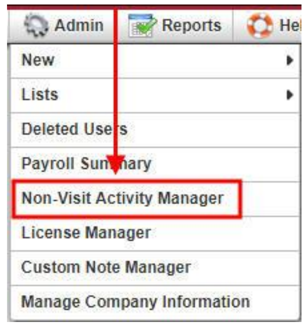
Admin/Deleted Users

In the new window, individual users can be restored back to active status by selecting the “Restore” hyperlink on the far right under the Action column. Check one or more boxes to the left of user Names, then select the “Restore” button at the bottom of the window to restore multiple users. Select the “Excel Export (Deleted)” button in the top right to create an excel spreadsheet with all deleted users listed.

Name	Title	Email	Phone	Mobile	Employment	Status	Gende	Created	Action
1 Example RN [deleted]	LVN/LPN	1@example.com			Contractor	Inactive	Male	03/31/201	Restore
1Hannah Jones [deleted]	Other	1hannah@gmail.com			Employee	Inactive	Female	09/27/201	Restore
2 Example Office [deleted]	Office Manager	2@example.com			Employee	Inactive	Male	03/31/201	Restore
2Hannah Jones [deleted]	Administrator	2hannah@gmail.com			Employee	Inactive	Female	09/27/201	Restore
3 Example HHA [deleted]	CEO	3@example.com			Contractor	Inactive	Male	03/31/201	Restore
3Hannah Jones HHA [deleted]	Home Health Aide/Nurse Aide	3hannah@gmail.com			Employee	Inactive	Female	09/27/201	Restore
A Plus Contract Nurse RN [deleted]	Other	bogus3@yahoo.com			Contractor	Inactive	Female	10/16/201	Restore
Aalian Ani RN [deleted]	Administrator	hb22334455@gmail.com	(214) 222-2222		Employee	Inactive	Female	05/09/201	Restore
Aaron Ashley RN [deleted]	Director of Nursing	Aaron.Ashley@myvalleyhomecare.c			Employee	Inactive	Male	05/16/201	Restore
Aaron Fiddes RN [deleted]	Administrator	aaronafiddes@yahoo.com			Employee	Inactive	Male	03/15/201	Restore

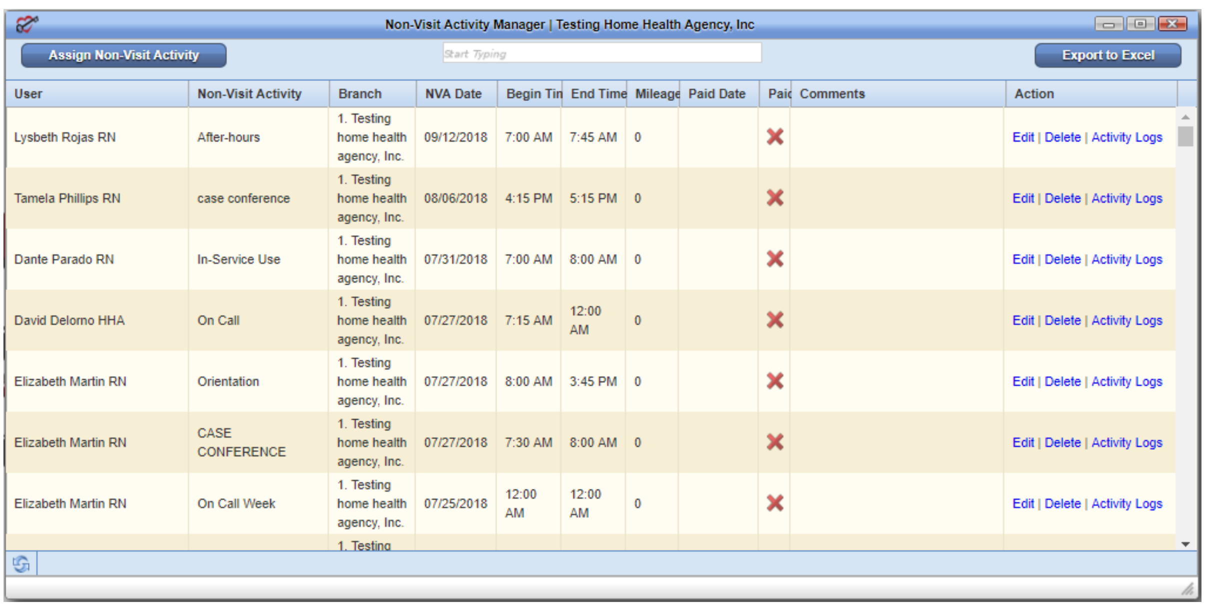
NON-VISIT ACTIVITY MANAGER:

Admin/Non-Visit Activity Manager



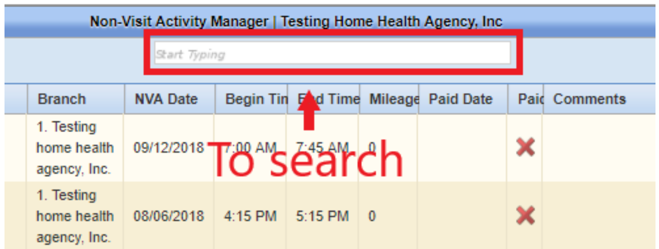
NOTE: Non-Visit Activities tasks needs to be created/added first. Go to *Admin/List/Non-Visit Activity* and create the activity types/task.

A window will open in which all currently assigned non-visit activity is shown. Select the “Export to Excel” button in the top right to create an excel spreadsheet with all non-visit activity listed.

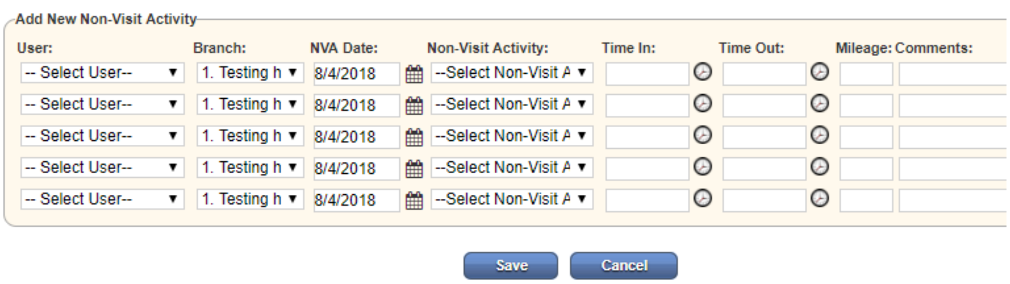


User	Non-Visit Activity	Branch	NVA Date	Begin Tin	End Time	Mileage	Paid Date	Paic	Comments	Action
Lysbeth Rojas RN	After-hours	1. Testing home health agency, Inc.	09/12/2018	7:00 AM	7:45 AM	0		✗		Edit | Delete | Activity Logs
Tamela Phillips RN	case conference	1. Testing home health agency, Inc.	08/06/2018	4:15 PM	5:15 PM	0		✗		Edit | Delete | Activity Logs
Dante Parado RN	In-Service Use	1. Testing home health agency, Inc.	07/31/2018	7:00 AM	8:00 AM	0		✗		Edit | Delete | Activity Logs
David Delorno HHA	On Call	1. Testing home health agency, Inc.	07/27/2018	7:15 AM	12:00 AM	0		✗		Edit | Delete | Activity Logs
Elizabeth Martin RN	Orientation	1. Testing home health agency, Inc.	07/27/2018	8:00 AM	3:45 PM	0		✗		Edit | Delete | Activity Logs
Elizabeth Martin RN	CASE CONFERENCE	1. Testing home health agency, Inc.	07/27/2018	7:30 AM	8:00 AM	0		✗		Edit | Delete | Activity Logs
Elizabeth Martin RN	On Call Week	1. Testing home health agency, Inc.	07/25/2018	12:00 AM	12:00 AM	0		✗		Edit | Delete | Activity Logs
		1. Testing								

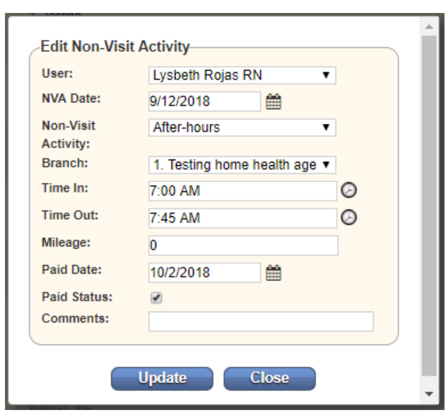
To search through the list, start typing in the text space at the top of the page. Search by Users, Non-Visit Activity, Branch, NVA Date, Begin and End Time, Mileage, Paid Date and Comments.



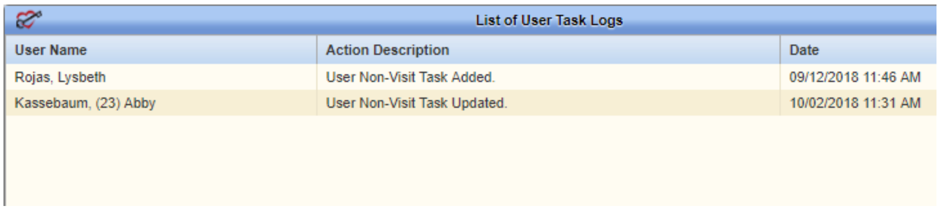
To “Assign Non-Visit Activity,” select the button in the top left. A window opens in which new non-visit activity can be added. Select the User from the drop-down menu, then choose the branch (if more than one). Write in or select NVA Date from the calendar, then select the specific Non-Visit Activity from the drop-down menu. Enter the Time In and Out by writing in or by selecting from the clock. Then enter Mileage and any Comments related to the activity. Five non-visit activity entries can be added at once. Once completed, select the “Save” button at the bottom of the window. If more than five entries need to be added, “Save” and select the “Assign Non-Visit Activity” button again.



To edit the non-visit activity, select the “Edit” hyperlink on the far right under the Action column. Unlike the previous seen activity entry, here a Paid Date (write in or calendar select) can be entered and verify the activity’s Paid Status (check box). Checking the Paid Status box will change the icon seen on first Non-Visit Activity window from a red “X” to a green check mark.



Selecting the “Activity Logs” hyperlink under the Action column will show which users have edited the activity entry and when. Choosing the “Delete” hyperlink under the same column will allow agencies to remove each entry individually.

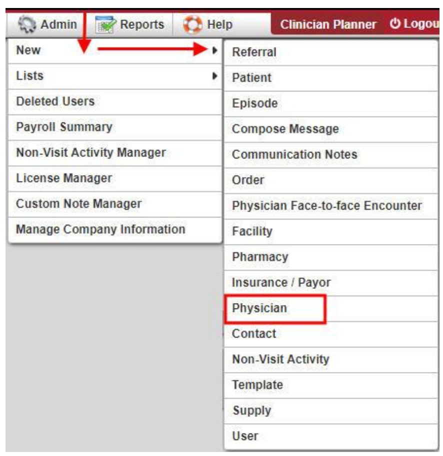


List of User Task Logs

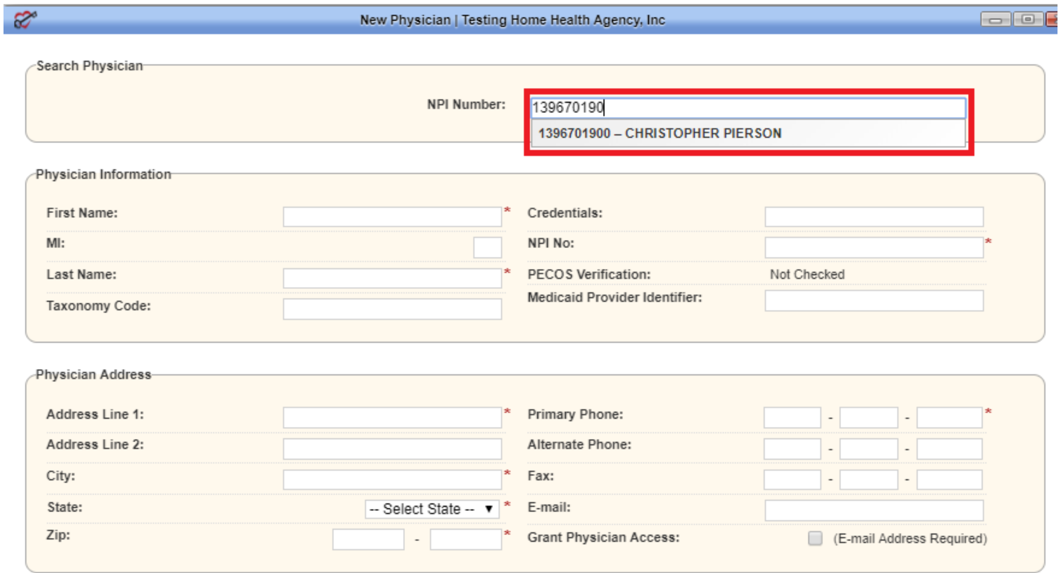
User Name	Action Description	Date
Rojas, Lysbeth	User Non-Visit Task Added.	09/12/2018 11:46 AM
Kassebaum, (23) Abby	User Non-Visit Task Updated.	10/02/2018 11:31 AM

ADDING A PHYSICIAN:

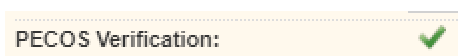
Admin/Lists/Physicians/New Physician, Admin/New/Physician or *Create/New/Physician*.



A new window will open. The quickest way to enter a physician is by entering their “NPI number.” As the number is typed, physicians and their corresponding NPI numbers will appear below for selection. After selecting the physician and pressing the tab key, the Physician Information and Address will auto-fill based on the information that is in the NPI registry. This can still be edited. Everything with a red asterisk is required.



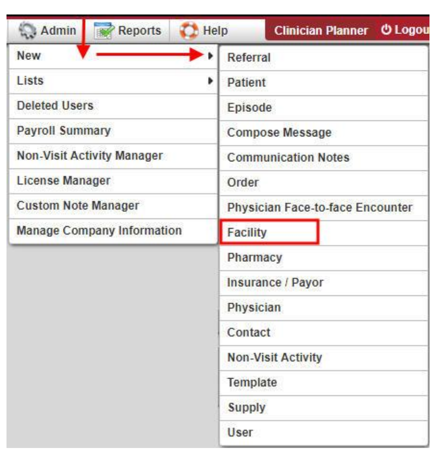
NOTE: If the NPI number is unknown, use the following website: https://npiregistry.cms.hhs.gov/registry/
If the physician is already listed in the NPI registry, the system will automatically do a "PECOS Verification." A green check mark indicates they are PECOS-verified, a red "X" indicates they are not.



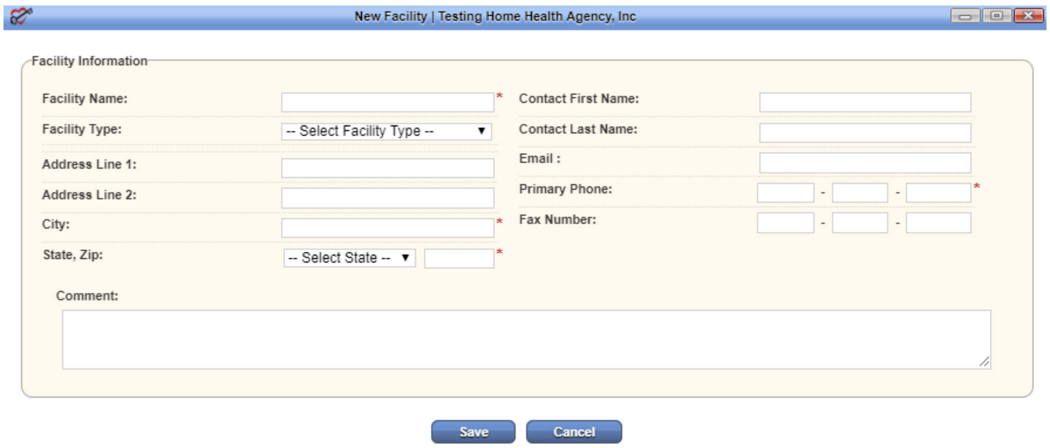
Once completed, select the "Save" button at the bottom.

ADDING A NEW FACILITY:

Admin/New/Facility, Admin/Lists/Facilities/New Facility or *Create/New/Facility*

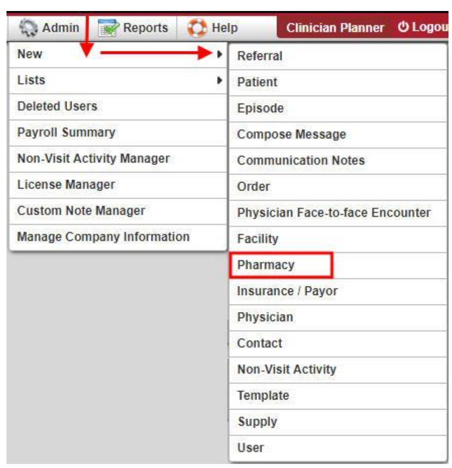


A new window will open. Enter the Facility Name, Address, Primary Phone, and as much information as possible. When finished, select the "Save" button at the bottom.

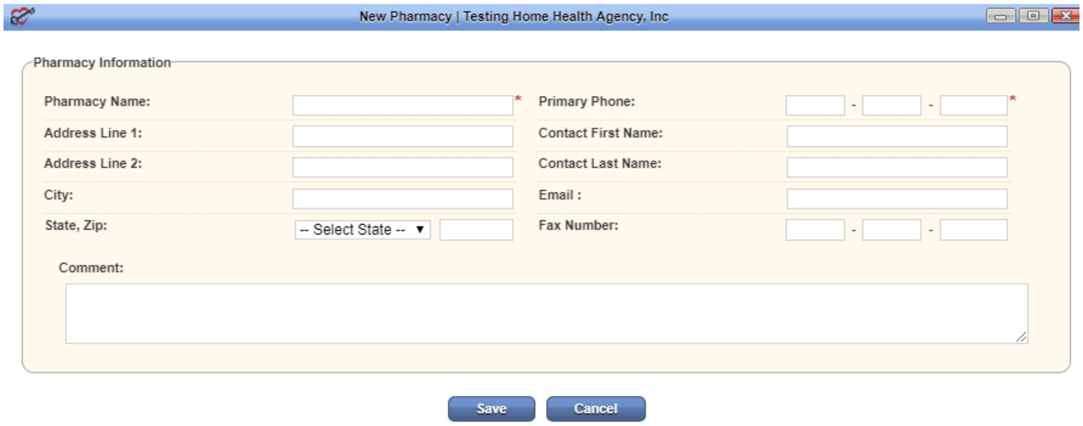


ADDING A NEW PHARMACY:

Admin/New/Pharmacy, Admin/Lists/Pharmacies/New Pharmacy or *Create/New/Pharmacy*.



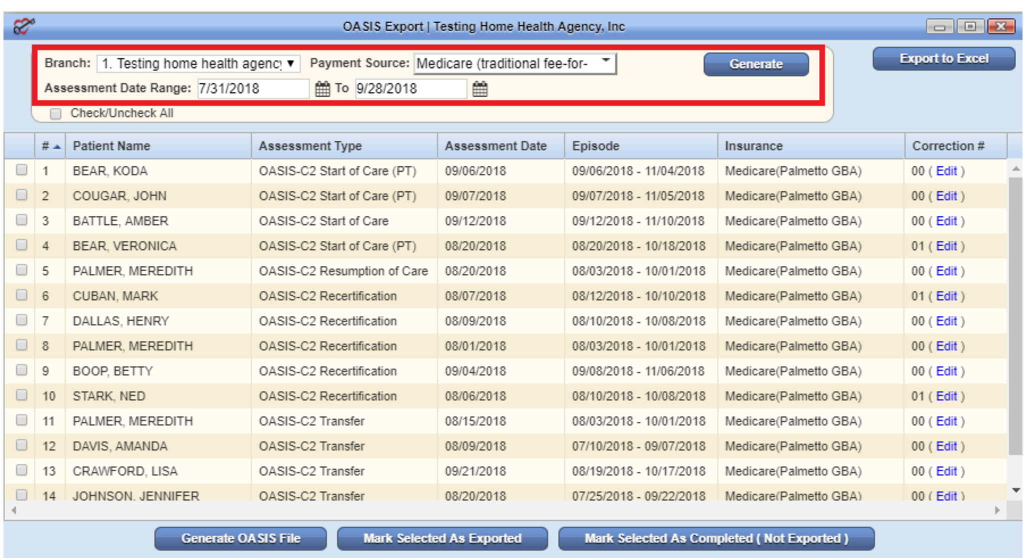
A new window will open. Input the Pharmacy Name and Primary Phone and all other information available. When finished, select the "Save" button at the bottom.



OASIS TRANSMISSION:

Create/OASIS Export

A new window will open. Filter for OASIS by choosing the Branch and Payment Source from the drop-down menus and selecting the desired Assessment Date Range. Then select “Generate.” The patient OASIS visits that meet the criteria will appear below.

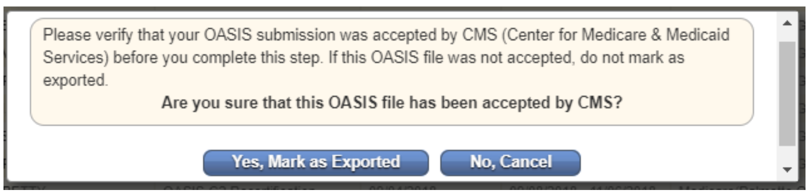


#	Patient Name	Assessment Type	Assessment Date	Episode	Insurance	Correction #
1	BEAR, KODA	OASIS-C2 Start of Care (PT)	09/06/2018	09/06/2018 - 11/04/2018	Medicare(Palmetto GBA)	00 (Edit)
2	COUGAR, JOHN	OASIS-C2 Start of Care (PT)	09/07/2018	09/07/2018 - 11/05/2018	Medicare(Palmetto GBA)	00 (Edit)
3	BATTLE, AMBER	OASIS-C2 Start of Care	09/12/2018	09/12/2018 - 11/10/2018	Medicare(Palmetto GBA)	00 (Edit)
4	BEAR, VERONICA	OASIS-C2 Start of Care (PT)	08/20/2018	08/20/2018 - 10/18/2018	Medicare(Palmetto GBA)	01 (Edit)
5	PALMER, MEREDITH	OASIS-C2 Resumption of Care	08/20/2018	08/03/2018 - 10/01/2018	Medicare(Palmetto GBA)	00 (Edit)
6	CUBAN, MARK	OASIS-C2 Recertification	08/07/2018	08/12/2018 - 10/10/2018	Medicare(Palmetto GBA)	01 (Edit)
7	DALLAS, HENRY	OASIS-C2 Recertification	08/09/2018	08/10/2018 - 10/08/2018	Medicare(Palmetto GBA)	00 (Edit)
8	PALMER, MEREDITH	OASIS-C2 Recertification	08/01/2018	08/03/2018 - 10/01/2018	Medicare(Palmetto GBA)	00 (Edit)
9	BOOP, BETTY	OASIS-C2 Recertification	09/04/2018	09/08/2018 - 11/06/2018	Medicare(Palmetto GBA)	00 (Edit)
10	STARK, NED	OASIS-C2 Recertification	08/06/2018	08/10/2018 - 10/08/2018	Medicare(Palmetto GBA)	01 (Edit)
11	PALMER, MEREDITH	OASIS-C2 Transfer	08/15/2018	08/03/2018 - 10/01/2018	Medicare(Palmetto GBA)	00 (Edit)
12	DAVIS, AMANDA	OASIS-C2 Transfer	08/09/2018	07/10/2018 - 09/07/2018	Medicare(Palmetto GBA)	00 (Edit)
13	CRAWFORD, LISA	OASIS-C2 Transfer	09/21/2018	08/19/2018 - 10/17/2018	Medicare(Palmetto GBA)	00 (Edit)
14	JOHNSON, JENNIFER	OASIS-C2 Transfer	08/20/2018	07/25/2018 - 09/22/2018	Medicare(Palmetto GBA)	00 (Edit)

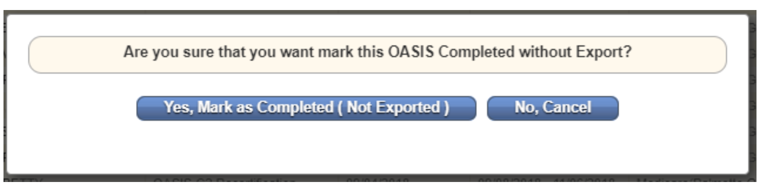
There are check boxes to the left of every patient name listed. Select one or multiple, then choose one of the buttons below. If “Generate OASIS File,” is chosen, the system will download the raw OASIS file on the computer to be uploaded to Center for Medicare Services (CMS). There is a “Check/Uncheck All” check box inside the search criteria that will either check all boxes listed or clear them.

NOTE: Create a folder on the computer where OASIS files can be stored for easy access.

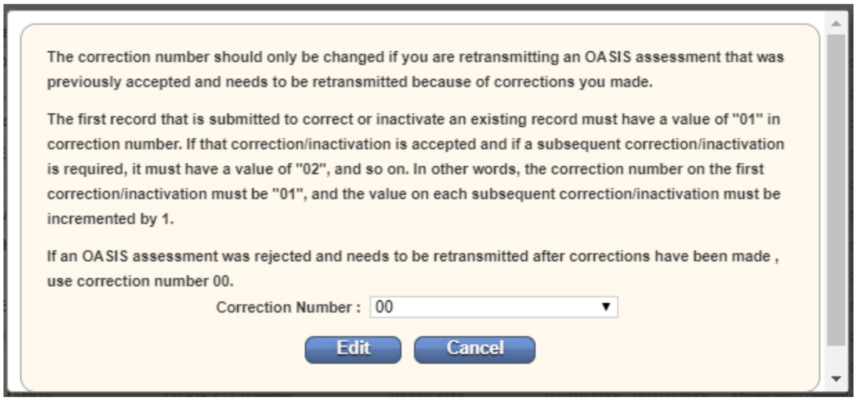
Once OASIS file(s) have been sent to CMS, go back inside the window, check the boxes of the OASIS that were submitted again (far left), then select the “Mark Selected As Exported” button at the bottom. A new window will open confirming that the OASIS file(s) have been accepted by CMS. To confirm, select the “Yes, Mark as Exported” button.



Similarly, if an OASIS needs to be marked as completed, but was not exported, check the box next to the Patient Name and then select the “Mark Selected As Completed (Not Exported)” button at the bottom of the page. A new window will open, and then select the “Yes, Mark as Completed (Not Exported)” button.



The list of OASIS can be exported to an Excel Spreadsheet by selecting the “Export to Excel” in the top right of the OASIS Export window. If submissions have been rejected and a corrected OASIS is being resubmitted, users can change the “Correction #” by selecting the “Edit” hyperlink on the far right of each OASIS line. A new window will open, and a warning will appear. Change the “Correction Number” by selecting on the drop-down then selecting the “Edit” button.

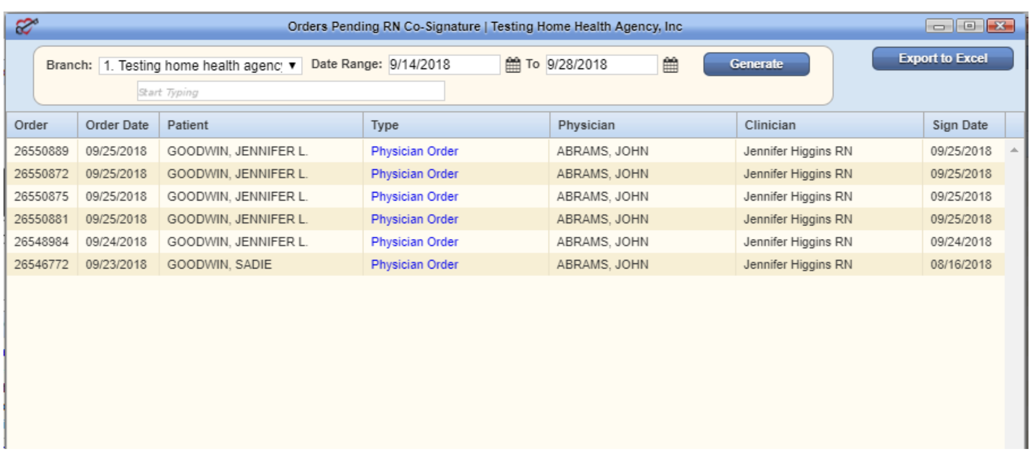


ORDERS MANAGEMENT:

View/Orders Management.

Split up into four sections:

1. **Orders Pending Co-Signature** – This is the section where orders are housed that need a co-signature because the user who signed the order requires a co-signature (per their permissions). To find a specific order, choose the Branch (if more than one) from the drop-down menu, then select a Date Range, then select the "Generate" button. Input any Order (number), Patient, Physician or Clinician name in the text space to narrow down the order list. The list of orders can also be exported to an Excel spreadsheet by selecting the "Export to Excel" button in the top right of the window.



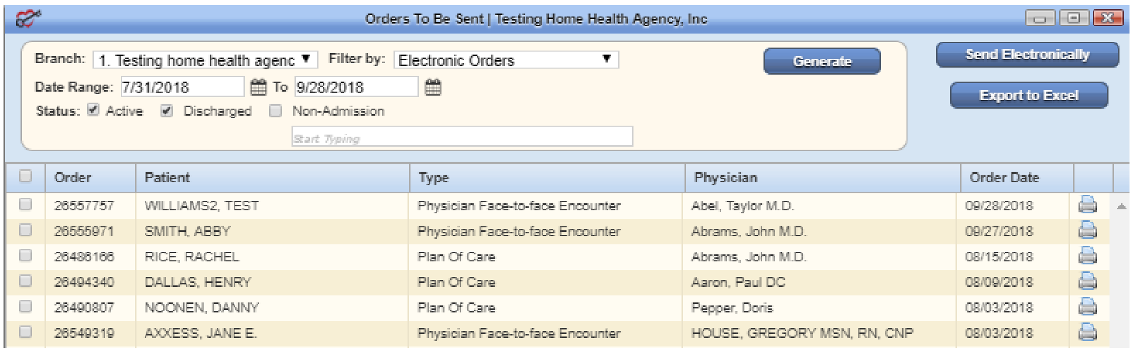
Order	Order Date	Patient	Type	Physician	Clinician	Sign Date
26550889	09/25/2018	GOODWIN, JENNIFER L.	Physician Order	ABRAMS, JOHN	Jennifer Higgins RN	09/25/2018
26550872	09/25/2018	GOODWIN, JENNIFER L.	Physician Order	ABRAMS, JOHN	Jennifer Higgins RN	09/25/2018
26550875	09/25/2018	GOODWIN, JENNIFER L.	Physician Order	ABRAMS, JOHN	Jennifer Higgins RN	09/25/2018
26550881	09/25/2018	GOODWIN, JENNIFER L.	Physician Order	ABRAMS, JOHN	Jennifer Higgins RN	09/25/2018
26548984	09/24/2018	GOODWIN, JENNIFER L.	Physician Order	ABRAMS, JOHN	Jennifer Higgins RN	09/24/2018
26546772	09/23/2018	GOODWIN, SADIE	Physician Order	ABRAMS, JOHN	Jennifer Higgins RN	08/16/2018

To co-sign an order, select the hyperlink under the column “Type.” A new window will open showing the printed version of the order. The three options with the order are the either, “Co-Sign,” “Print” or “Close.”

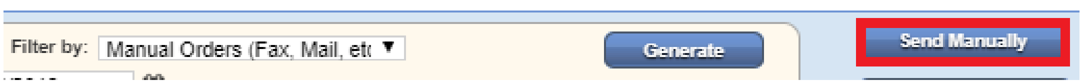
The co-signature window will open as shown below. After entering the co-signature, the user can either choose to “Co-Sign” the order or “Co-Sign And Approve.” After co-signing, the order will disappear from the Orders Pending RN Co-Signature window.

2. **Orders To Be Sent** – This window keeps orders that are ready to be sent to the physician for signature. Filtering for orders begins with the Branch (if more than one) from the drop-down menu. Then choose whether filtering by Electronic Orders or Manual Orders (Fax, Mail, etc.). How users choose to filter will change the button in the top right from

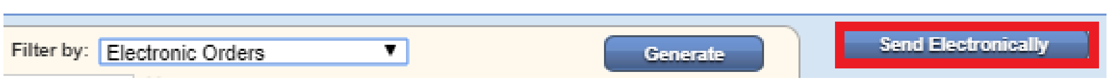
"Send Electronically" to "Send Manually." Choose the Date Range of the orders to be sent, then decide whether the orders are from patients with a Status of Active, Discharged and/or Non-Admission. Start typing any Order (number), Patient, Type or Physician name in the text space to narrow down the order list even further.



To print an order, select the printer icon  on the far right of the order. Once printed, check the boxes to the left of the order and select the "Send Manually" button (in the top right). They will be marked as sent to the physician with a green notification.



If the agency's physicians have access to the Physician Portal, orders should be sent electronically. This can be done by checking the boxes to the left of the orders and selecting the "Send Electronically" button in the top right.



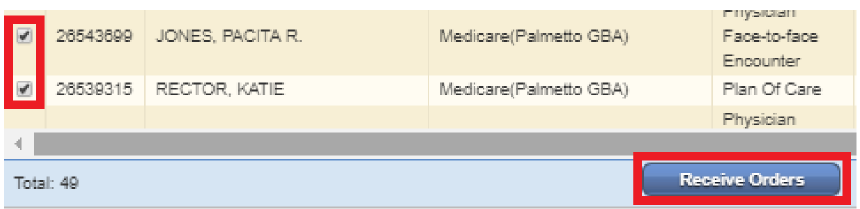
To export the list of orders that meet the search parameters, select the "Export to Excel" button in the top right.

3. **Orders Pending MD Signature** - This window shows orders that are ready to be electronically signed by the physician. Filtering for orders begins with the Branch (if more than one) from the drop-down menu. Choose the Date Range of the orders planning to be signed, then decide

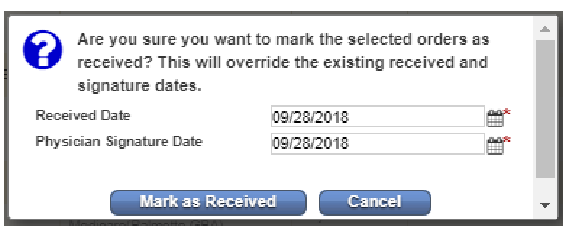
whether the orders are from patients with a Status of Active, Discharged and/or Non-Admission. Start typing any Order (number), Patient, Payor, Type Internal Referral Source or Physician name in the free text space to narrow down the order list even further.

Order	Patient	Payor	Type	Internal Referral Source	Physician	Order Date	Sent Date	Received Date	MD Sign Date	Action
26557828	HOBSON, CHARLIE	123Health Insurance	Physician Order		Betty, Bart	09/28/2018	09/28/2018			Receive Order
26555755	BEAR, JENN	Medicare(Palmetto GBA)	Physician Order		Aaron, Paul DC	09/27/2018	09/27/2018			Receive Order
26554585	GONZALEZ, SEBASTIAN E.	Medicare(Palmetto GBA)	Physician Order	Martha Gonzalez RN	Chill, Padma	09/26/2018	09/28/2018			Receive Order
26553725	KELLY, JOHN	21ST CENTURY INSURANCE	Physician Face-to-face Encounter	Aannette Tester RN	ACROPOLIS, ADONIS	09/26/2018	09/28/2018			Receive Order
26445495	AARDVARK, JUDY	11111111111111	Physician Order		Smith, Allison MD	09/25/2018	09/28/2018			Receive Order
26548139	CRAWFORD, LISA B.	Medicare(Palmetto GBA)	Physician Order		Abrams, John M.D.	09/24/2018	09/24/2018			Receive Order
26543699	JONES, PACITA R.	Medicare(Palmetto GBA)	Physician Face-to-face Encounter		Kaki, Suma M.D.	09/21/2018	09/28/2018			Receive Order
26539315	RECTOR, KATIE	Medicare(Palmetto GBA)	Plan Of Care		Andrews, Baxter	09/19/2018	09/20/2018			Receive Order
			Physician Face-							

When the physician is ready to sign orders, check the box to the left of the order then select the “Receive Orders” button at the bottom of the page.

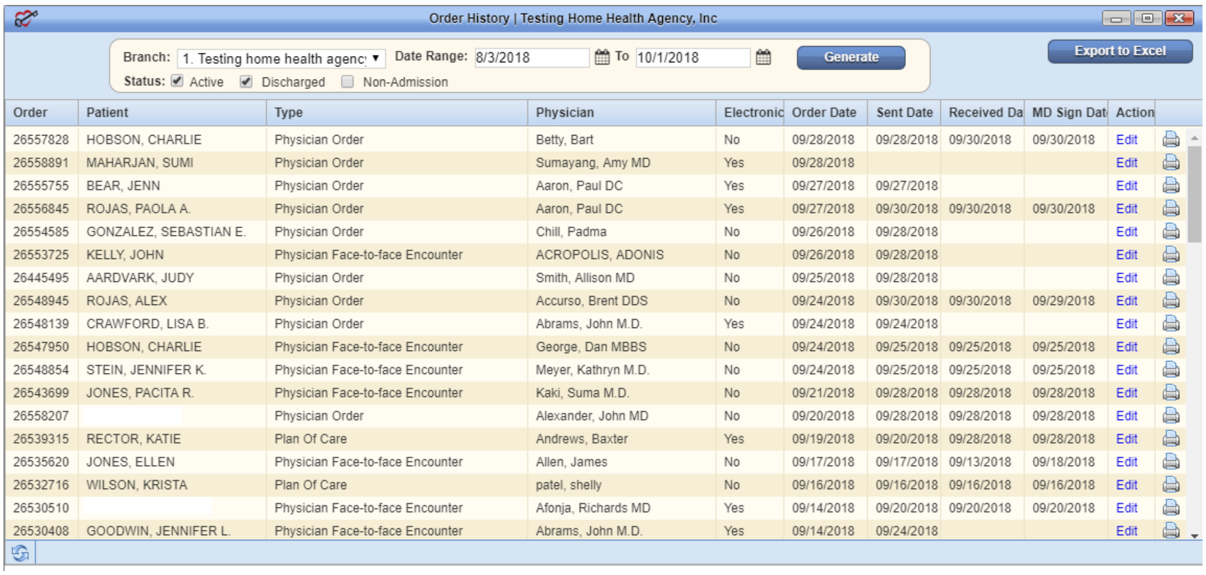


A new window will open where the doctor will confirm the Received and Physician Signature Date then select the “Mark as Received” button. The date auto populates with today’s date. Once marked as signed they will disappear from the Orders Pending Signature window and be in the Orders History section.



4. **Orders History** – This is where all orders in every status can be seen. Filtering for orders begins with the Branch (if more than one) from the drop-down menu. Choose the Date Range, then decide whether the orders are from patients with a Status of Active, Discharged and/or Non-Admission. Then select the Generate button. The results can be sorted by nine different columns by selecting the column heading: Order #, Patient,

Type, Physician, Electronic, Date, Sent Date, Received Date and MD Sign Date.

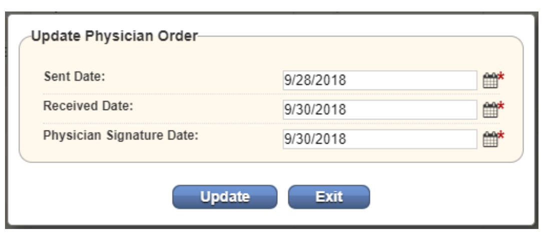

Order History | Testing Home Health Agency, Inc

Branch: 1. Testing home health agenc Date Range: 8/3/2018 To 10/1/2018 Generate Export to Excel

Status: Active Discharged Non-Admission

Order	Patient	Type	Physician	Electronic	Order Date	Sent Date	Received Da	MD Sign Dat	Action
26557828	HOBSON, CHARLIE	Physician Order	Betty, Bart	No	09/28/2018	09/28/2018	09/30/2018	09/30/2018	Edit
26558891	MAHARJAN, SUMI	Physician Order	Sumayang, Amy MD	Yes	09/28/2018				Edit
26555755	BEAR, JENN	Physician Order	Aaron, Paul DC	Yes	09/27/2018	09/27/2018			Edit
26556845	ROJAS, PAOLA A.	Physician Order	Aaron, Paul DC	Yes	09/27/2018	09/30/2018	09/30/2018	09/30/2018	Edit
26554585	GONZALEZ, SEBASTIAN E.	Physician Order	Chill, Padma	No	09/26/2018	09/28/2018			Edit
26553725	KELLY, JOHN	Physician Face-to-face Encounter	ACROPOLIS, ADONIS	No	09/26/2018	09/28/2018			Edit
26445495	AARDVARK, JUDY	Physician Order	Smith, Allison MD	No	09/25/2018	09/28/2018			Edit
26548945	ROJAS, ALEX	Physician Order	Accurso, Brent DDS	No	09/24/2018	09/30/2018	09/30/2018	09/29/2018	Edit
26548139	CRAWFORD, LISA B.	Physician Order	Abrams, John M.D.	Yes	09/24/2018	09/24/2018			Edit
26547950	HOBSON, CHARLIE	Physician Face-to-face Encounter	George, Dan MBBS	No	09/24/2018	09/25/2018	09/25/2018	09/25/2018	Edit
26548854	STEIN, JENNIFER K.	Physician Face-to-face Encounter	Meyer, Kathryn M.D.	No	09/24/2018	09/25/2018	09/25/2018	09/25/2018	Edit
26543699	JONES, PACITA R.	Physician Face-to-face Encounter	Kaki, Suma M.D.	No	09/21/2018	09/28/2018	09/28/2018	09/28/2018	Edit
26558207		Physician Order	Alexander, John MD	No	09/20/2018	09/28/2018	09/28/2018	09/28/2018	Edit
26539315	RECTOR, KATIE	Plan Of Care	Andrews, Baxter	Yes	09/19/2018	09/20/2018	09/28/2018	09/28/2018	Edit
26535620	JONES, ELLEN	Physician Face-to-face Encounter	Allen, James	No	09/17/2018	09/17/2018	09/13/2018	09/18/2018	Edit
26532716	WILSON, KRISTA	Plan Of Care	patel, shelly	No	09/16/2018	09/16/2018	09/16/2018	09/16/2018	Edit
26530510		Physician Face-to-face Encounter	Afonja, Richards MD	Yes	09/14/2018	09/20/2018	09/20/2018	09/20/2018	Edit
26530408	GOODWIN, JENNIFER L.	Physician Face-to-face Encounter	Abrams, John M.D.	Yes	09/14/2018	09/24/2018			Edit

Select the “Edit” hyperlink to update an order’s Sent, Received or Physician Signature Date. A new window will open. Type in the date or select the calendar icon on the right. Select “Update” to save.


Update Physician Order

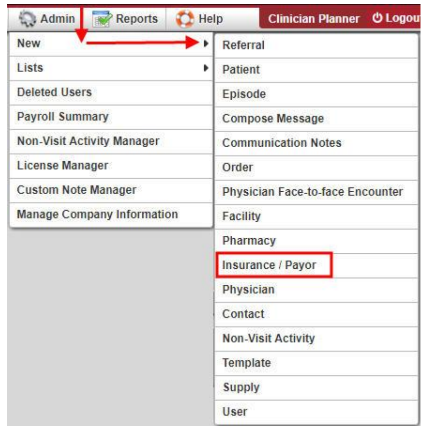
Sent Date:	9/28/2018
Received Date:	9/30/2018
Physician Signature Date:	9/30/2018

Update Exit

Select the refresh icon in the bottom left for the Orders History window to reflect the most recent status of all orders. Select the printer icon on the far right to re-print any orders that need to be sent/re-sent for signature. Select the “Export to Excel” button in the top right to create an Excel spreadsheet of all orders in the window (based off search parameters).

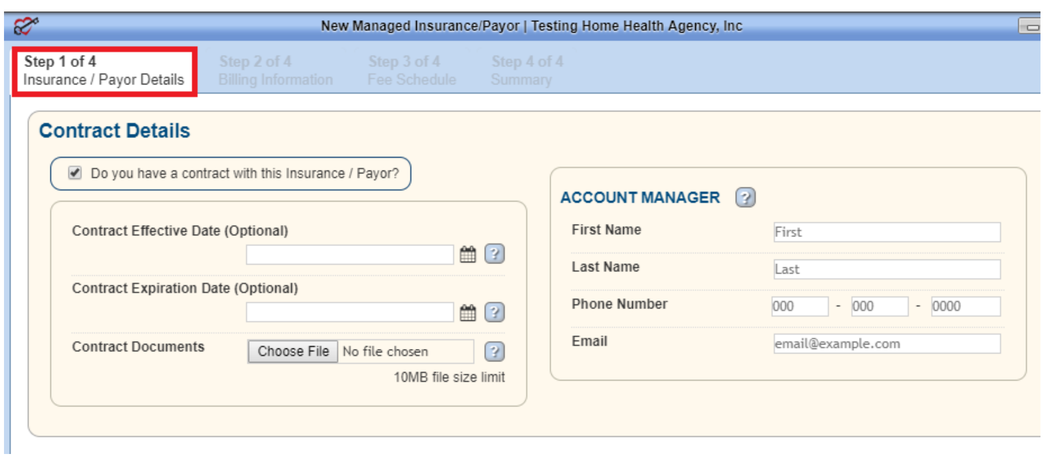
ADDING AN INSURANCE/PAYOR:

Admin/New/Insurance_Payor, Admin/Lists/Insurances_Payors/New Insurance or *View/Lists/Insurances_Payors/New Insurance.*



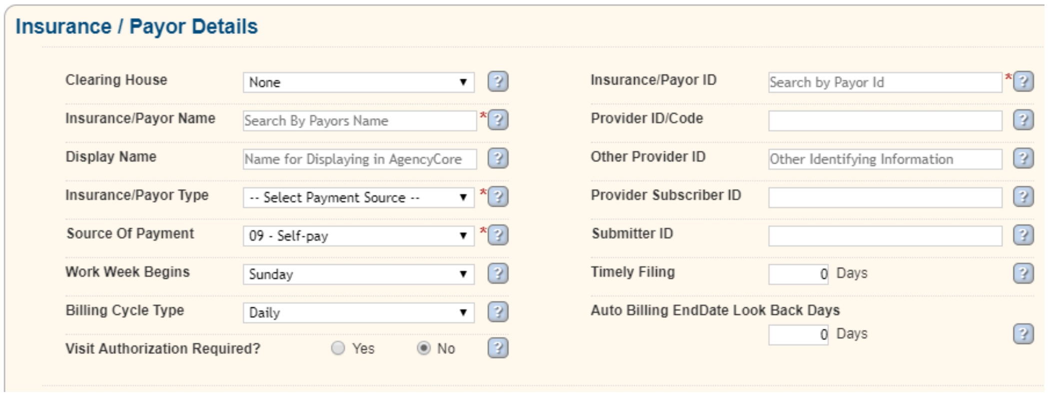
A new window will appear. The new payor window is split up into four steps/tabs:

1. **Insurance/Payor Details** – If there is not a contract with the insurance, uncheck the very top box and the Contract Details section will collapse. If there is a contract, enter the Contract Effective and Expiration Date by either writing in or selecting the calendar icon. Add any documentation related to the payor as an attachment by selecting on the "Choose File" button, finding the document saved on the computer, then select the "Open" button (10mb file size limit). Enter the Account Manager information in the next section including First and Last Name, Phone Number and Email. None of the Contract Details section is required.

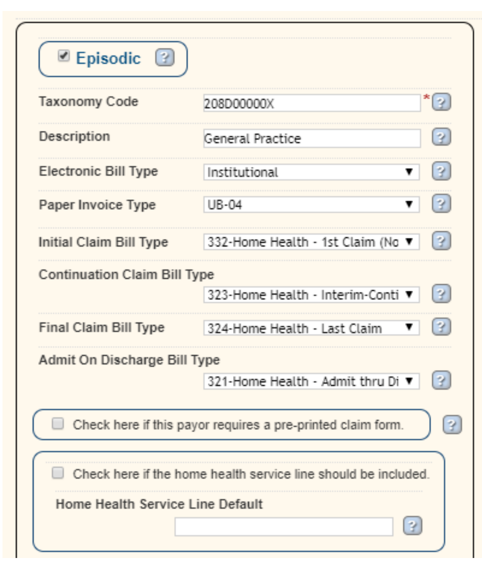


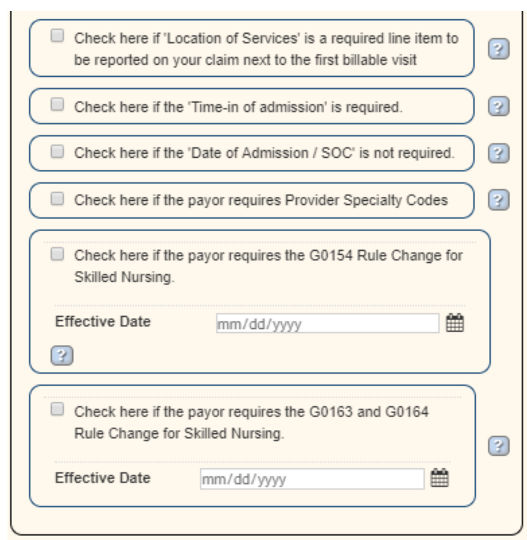
NOTE: The question mark icon is a reference. Hover over the icon for more insight about that question or section.

The next section is for payor details. Below are the selections that auto-populate when adding a new payor. It is required to enter an Insurance/Payor Name, Type, ID and Source of Payment. If Claims are submitted electronically through Axxess Select Availity as the clearinghouse, enter Submitter ID “00000.”

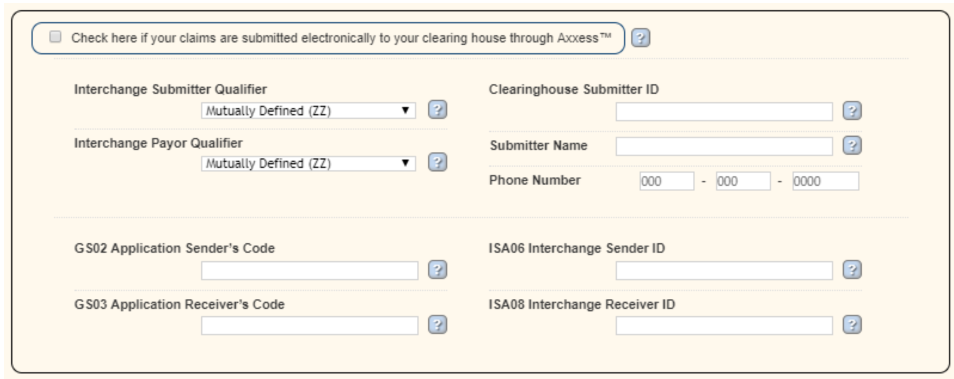


Select whether the payor pays Episodic, Per Visit or both by checking the corresponding boxes. The Episodic and Per Visit columns both ask the same questions seen below. Taxonomy code should be for Home Health, and if it is Episodic, the Initial Claim Bill type should be 322, Continuation 323, Final 329 and Admit thru Discharge must be 321. If it is a Per Visit Claim, make sure the agency is billing HCFA-1500 or UB-04. If it is a HCF-1500, it has to be Professional and UB-04 is an Institutional Claim. For Per Visit Claims, Initial Claim Bill type should be 322, Continuation 323, Final 324 and Admit thru Discharge must be 321.

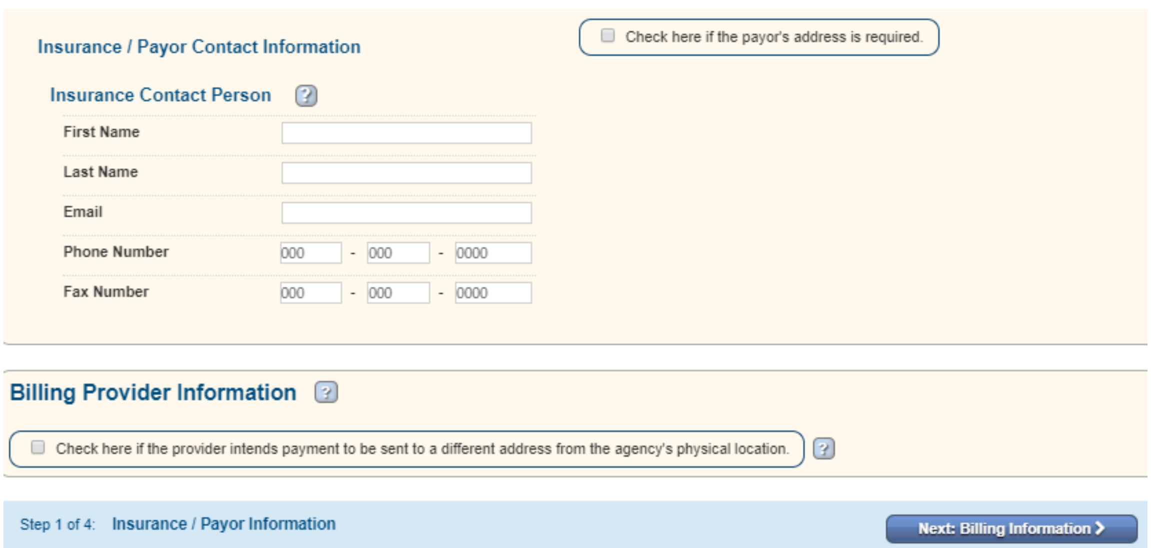




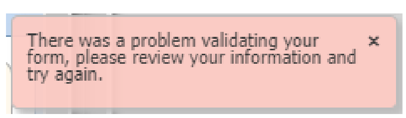
The next section will be entering the clearinghouse information. If Axxess is used for the clearinghouse, check the box at the top of the section and it will collapse.



In the next section, enter the contact information of the person whom the agency communicates with at the insurance company. If the payor's address is required, check the box to the right and enter that address. If the insurance wants their payments to be sent to a different address from their physical location, check the box at the very bottom of the page. Once completed with all the information in this page/tab, select the "Next: Billing Information >" button in the bottom right. There will be a green notification stating the new Insurance/Payor has been added successfully.

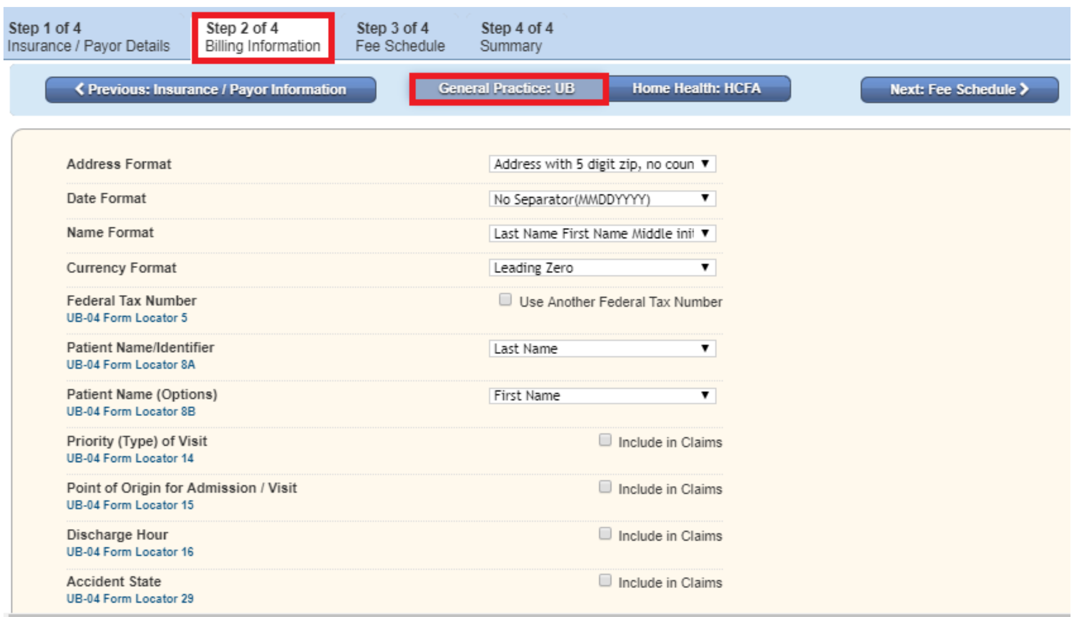


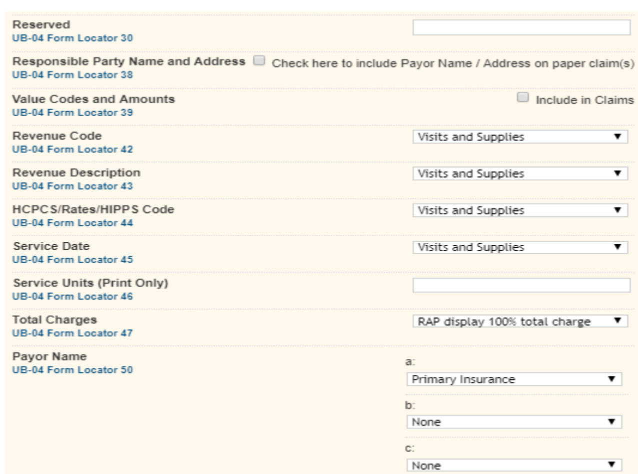
NOTE: If all required information is not entered, the following notification will appear:

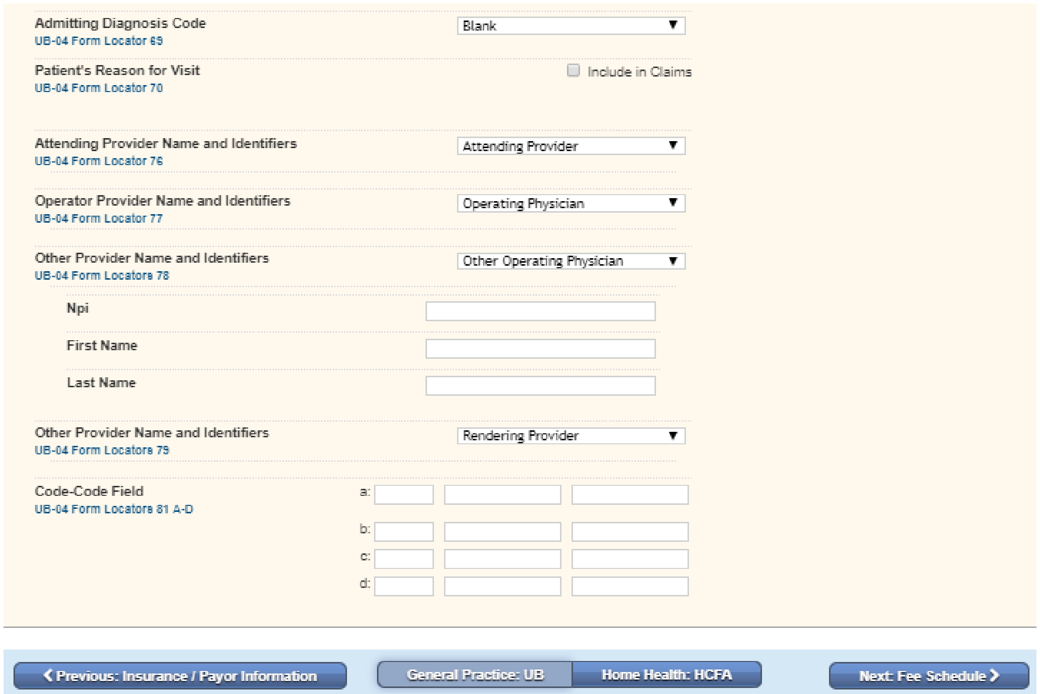


The required sections that are missing information will be highlighted in red:

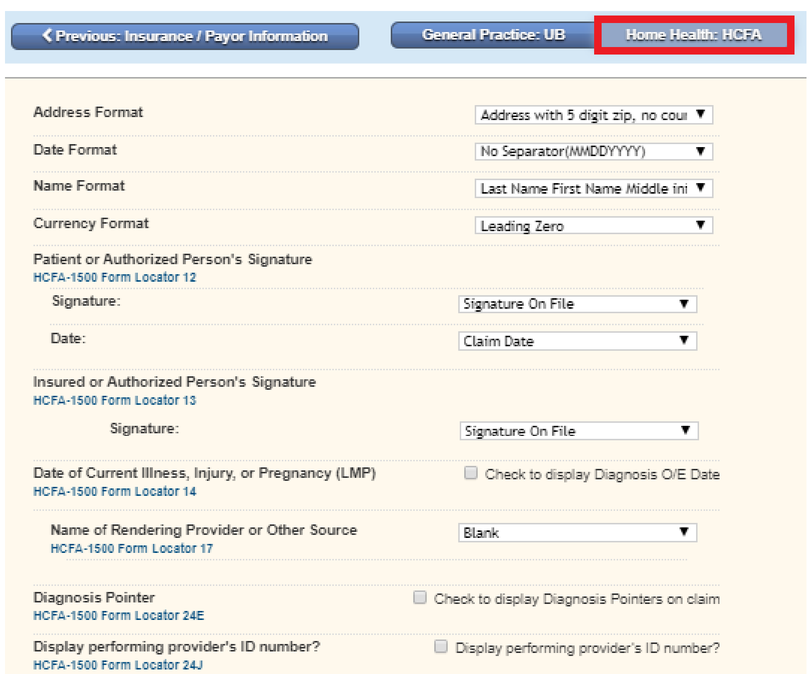
2. **Billing Information** – Depending on how the insurer pays, whether episodic or per visit, will determine which sections will show here. The payor being added in the screenshot below is both episodic and per visit so it shows both the “General Practice: UB” and “Home Health: HCFA” sections. Starting with the UB billing information. This can be seen with the selection being a lighter shade of blue. Choose from the drop-downs and select the boxes that will build out the UB-04 Form and the Locator sections on the form.



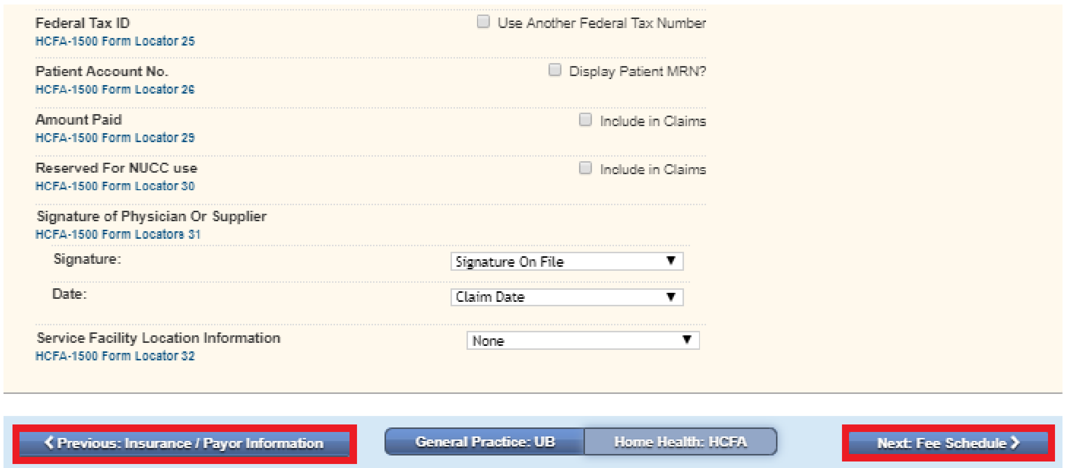




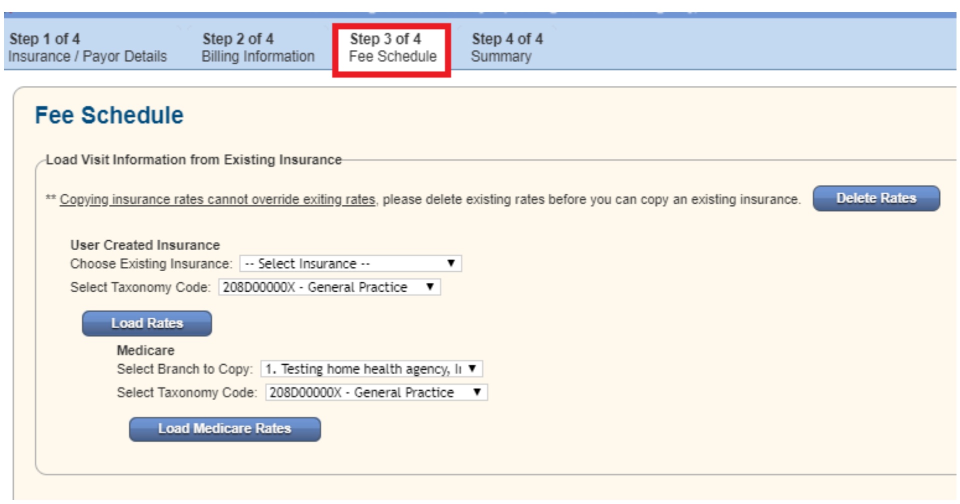
The following are the questions related to filling out the HCFA–1500 and the Locators of that form.



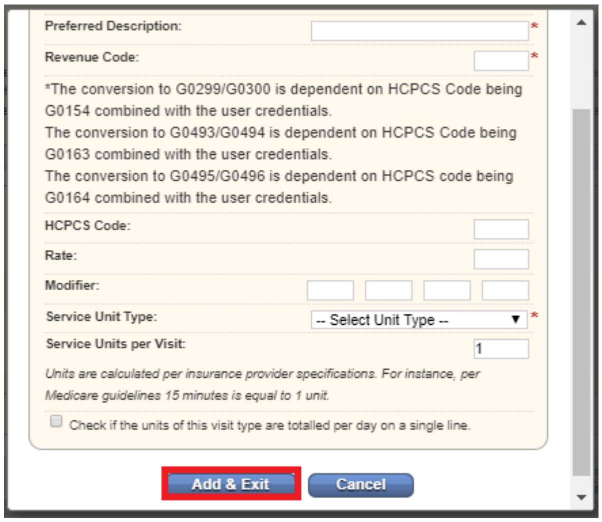
Toggle in between tabs/steps by selecting the “< Previous: Insurance/Payor Information” and “Next: Fee Schedule >” buttons at the bottom of the page. A green notification will appear stating the Billing Information has been updated successfully.



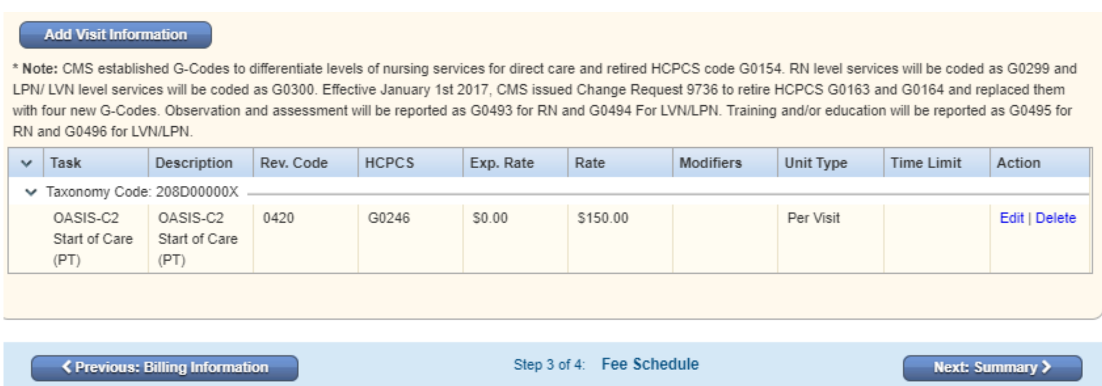
3. **Fee Schedule** – In this step, the agency can add the fees for all visits by either loading visit information from other payors or adding visit information. Delete any rates that were manually added if the agency plans to copy insurance rates from another. This can be done by selecting the “Delete Rates” button (this will delete *all* rates listed below). To then copy the rates from another insurance, select the Existing Insurance from the drop-down menu, then confirm the Taxonomy Code from that drop-down menu. Then select the “Load Rates” button. The rates will then display at the bottom of the page in the grid.



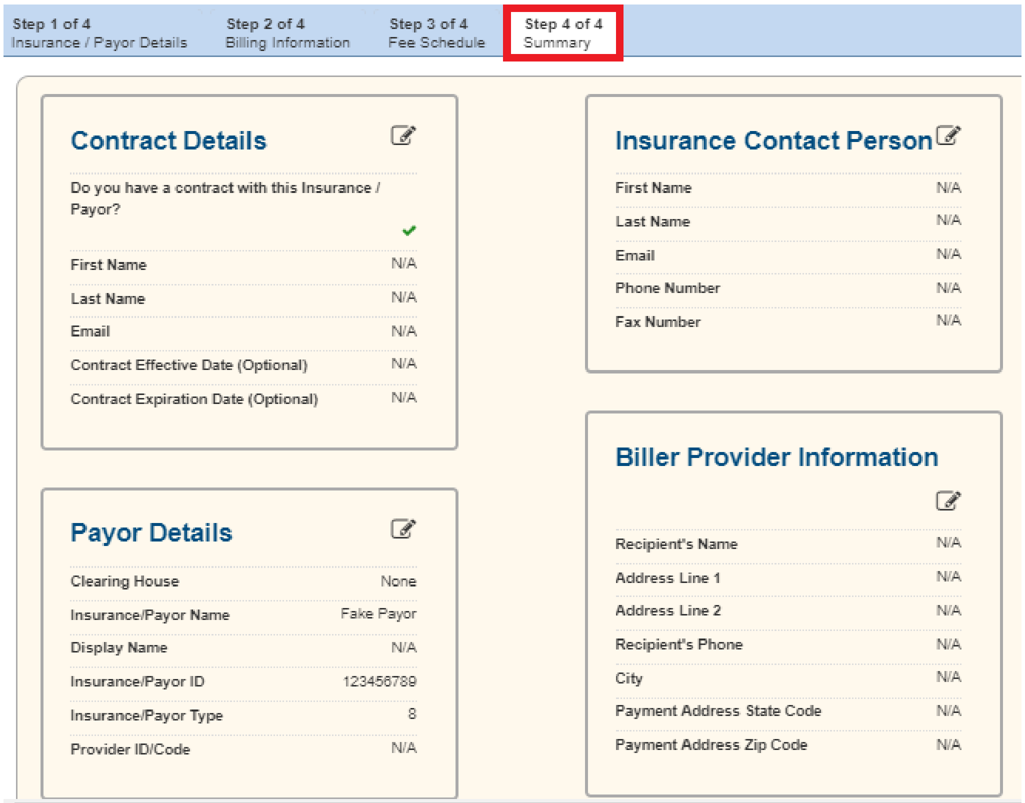
If visit information is being added per visit, select the “Add Visit Information” button. A New Visit Information window will open. Confirm the Taxonomy Code, select the Task from the drop-down menu, input a Preferred Description and Revenue Code. There are some suggestions about G-codes. Enter the HCPCS Code, Rate, Modifier and choose the Service Unit Type. Service Units per Visit will auto-generate to 1. Once completed, select the “Add & Exit” button at the bottom of the form.



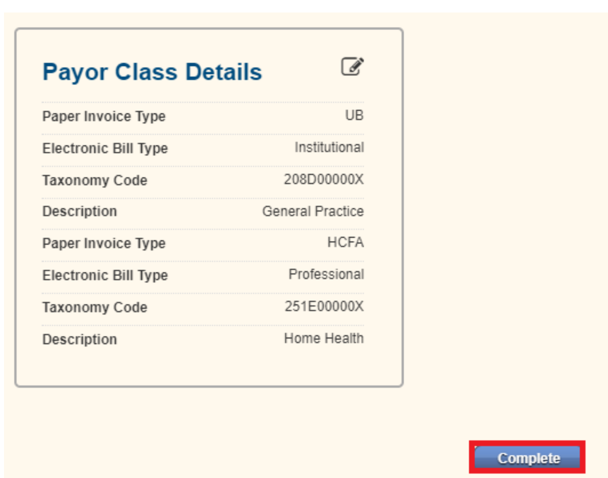
Manually entered or copied rates now display towards the bottom. To the far right there is a hyperlink option to “Edit” (which will go to the previous screenshot) or the “Delete” which removes the individual rate.



4. **Summary** – The last step will show a summary of all previously entered information at a glance.



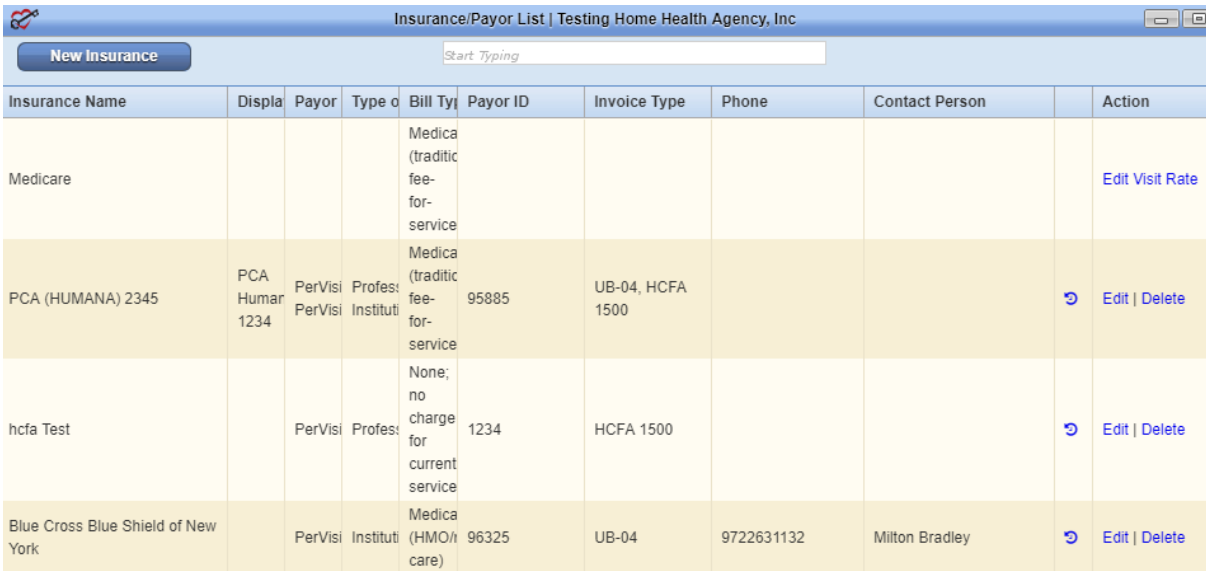
Once completed, select the “Complete” button at the bottom of the page. A green notification will state that the payor has been saved successfully.



EDITING AN EXISTING PAYOR:

Admin/Lists/Insurances_Payors or *View/Lists/Insurances_Payors*

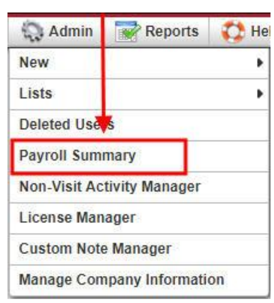
Select the “Edit” hyperlink to the far right of the screen under the Action column. This is also where the “Delete” function is found. The icon will show an Activity Log that lists which users have made any changes to the payor and when they were made. To search for a payor, Start Typing any part of the Insurance, Display Name, Payor Class, Type of Bill, Bill Type, Payor ID, Invoice Type, Phone or Contact Person in the white free text space at the very top of the page.



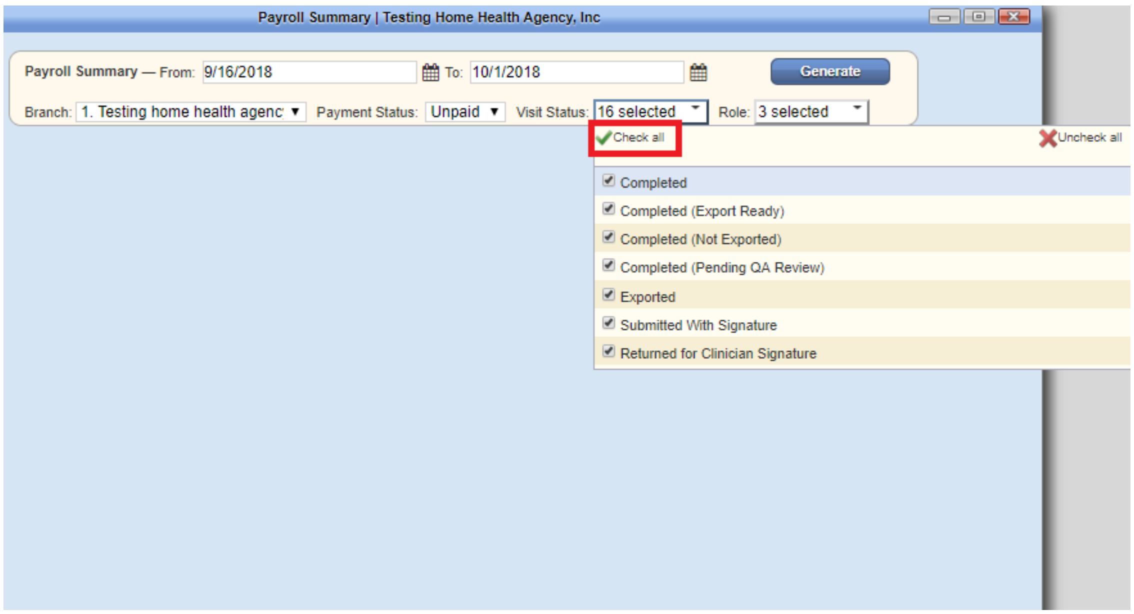
Insurance Name	Displa	Payor	Type o	Bill Typ	Payor ID	Invoice Type	Phone	Contact Person		Action
Medicare				Medica (traditic fee-for-service						Edit Visit Rate
PCA (HUMANA) 2345	PCA Humar 1234	PerVisi PerVisi	Profes: Instituti	Medica (traditic fee-for-service	95885	UB-04, HCFA 1500				Edit | Delete
hcfa Test		PerVisi	Profes:	None; no charge for current service	1234	HCFA 1500				Edit | Delete
Blue Cross Blue Shield of New York		PerVisi	Instituti	Medica (HMO/r care)	96325	UB-04	9722631132	Milton Bradley		Edit | Delete

PAYROLL SUMMARY:

Admin/Payroll Summary

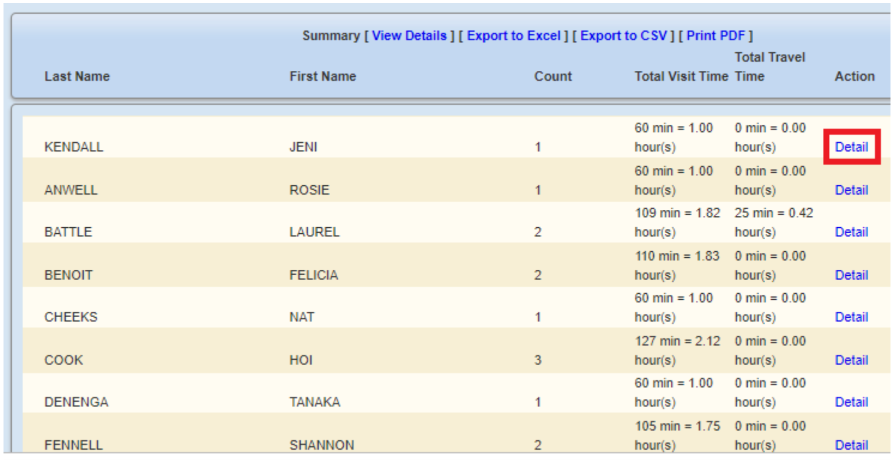


The following window will open with only search criteria at the top. Choose the date range in the From and To entries. Select the branch from the drop-down (if there is more than one). Indicate whether the Payment Status is either Paid, Unpaid or All. Select which types of Visit Status' should be seen by checking the corresponding boxes. Selecting the green check mark will select all statuses and selecting the red X will uncheck all choices. Also choose the Role (category of employee) or combination of roles from Employee, Contractor and Student/Volunteer. Select the "Generate" button in the top right to see the results.



Employees will be listed by name, showing their visit Count, Total Visit Time and Total Travel Time. There are two ways of looking at the detailed version. The first, under Summary-View Details, will show the details of all employees. Selecting the Detail under the Action column on the far right will show the detail of that employee. With this group, users can either View Details of all employee visits at once (next to Summary), "Export to Excel" or CSV to put the information in an Excel spreadsheet, or view a printed version of the data by selecting the "Print PDF."

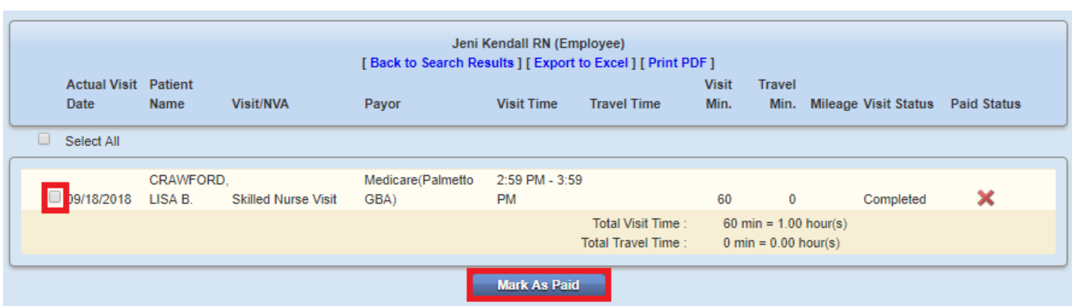
NOTE: CSV is a comma separated value file text file. XLS is Microsoft's Excel format that is far more expressive than CSV, allowing graphs, formulas and the like to be stored, and it is a binary file.



Summary [View Details] [Export to Excel] [Export to CSV] [Print PDF]

Last Name	First Name	Count	Total Visit Time	Total Travel Time	Action
KENDALL	JENI	1	60 min = 1.00 hour(s)	0 min = 0.00 hour(s)	Detail
ANWELL	ROSIE	1	60 min = 1.00 hour(s)	0 min = 0.00 hour(s)	Detail
BATTLE	LAUREL	2	109 min = 1.82 hour(s)	25 min = 0.42 hour(s)	Detail
BENOIT	FELICIA	2	110 min = 1.83 hour(s)	0 min = 0.00 hour(s)	Detail
CHEEKS	NAT	1	60 min = 1.00 hour(s)	0 min = 0.00 hour(s)	Detail
COOK	HOI	3	127 min = 2.12 hour(s)	0 min = 0.00 hour(s)	Detail
DENENGA	TANAKA	1	60 min = 1.00 hour(s)	0 min = 0.00 hour(s)	Detail
FENNELL	SHANNON	2	105 min = 1.75 hour(s)	0 min = 0.00 hour(s)	Detail

The following is a detail of just one employee. It shows the Actual Visit Date, Patient Name, Visit/NVA, Payor, Visit and Travel Time, Visit and Travel minimum, Mileage, Visit and Paid Status. To change the Paid Status, check the box to the left of the Actual Visit Date and select the “Mark As Paid” button, which will change the red “X” to a green check mark. If the employee has more than one visit that needs to be marked as paid, select the Select All check box at the top left below the column headers. With this data, either “Export to Excel” to put the information in an Excel spreadsheet and/or view a printed version of the data by selecting the “Print PDF” hyperlink below the employee name. Select the “Back to Search Results” to go back to the full list of employees.



Jeni Kendall RN (Employee)

[Back to Search Results] [Export to Excel] [Print PDF]

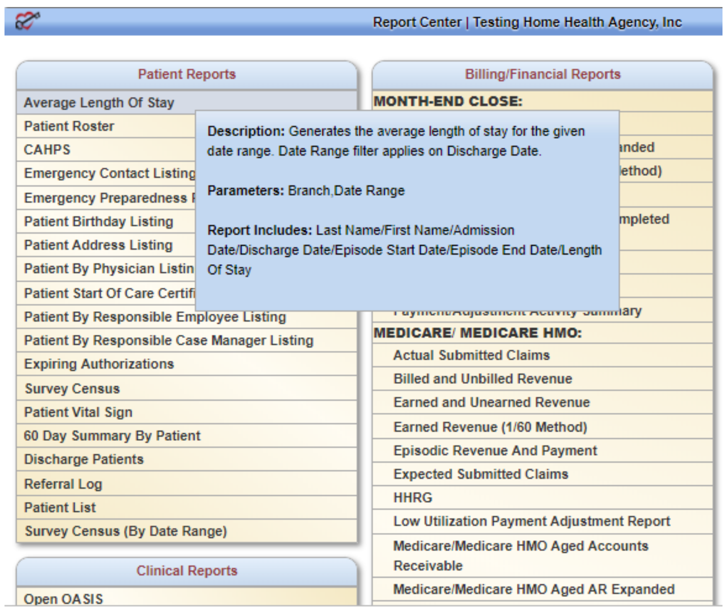
Actual Visit Date	Patient Name	Visit/NVA	Payor	Visit Time	Travel Time	Visit Min.	Travel Min.	Mileage	Visit Status	Paid Status
Select All										
09/18/2018	CRAWFORD, LISA B.	Skilled Nurse Visit	Medicare(Palmetto GBA)	2:59 PM - 3:59 PM		60	0		Completed	✖
					Total Visit Time :	60 min = 1.00 hour(s)				
					Total Travel Time :	0 min = 0.00 hour(s)				

Mark As Paid

REPORT CENTER:

Reports/Report Center

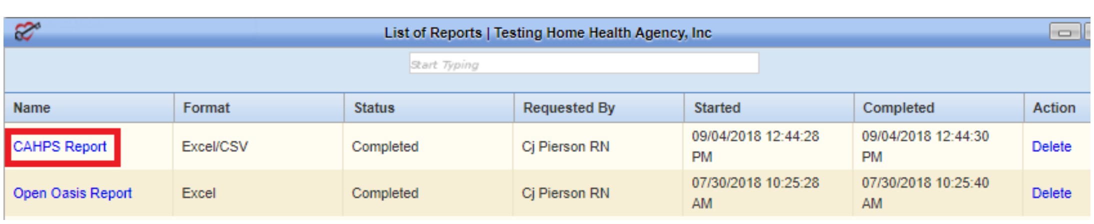
This is the place all AgencyCore reports are found. They are separated into seven categories (with two additional for Missouri and California). The categories are Patient, Billing/Financial, Statistical, Clinical, Payroll, Employee and Schedule Reports. Hovering over the report will show what the report entails, its Description, Parameters and what the Report Includes.



Most of the reports function the same way. In the example report below, Patient Roster, parameters must be chosen, then selecting the button to the right of them to “Generate Report” will display the results below (with a grand total at the very bottom). Selecting the “Export to Excel” will put the information into an Excel spreadsheet. Selecting the “Reports Home” button at the very top of the page will go back to the list of all reports.

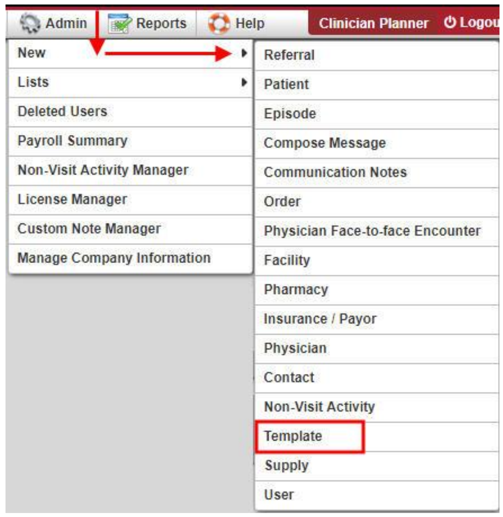
Some reports do not generate instantaneously. For example, the CAHPS report must be requested. To do this, select the parameters then select the “Request Report” button to the right of the parameters.

The request then goes to a different window. It can be found in *Reports/Completed Reports*. Here, users can retrieve a copy of the finished report and see who ran the report and when. Search through the completed reports by typing the Name, Format, Requested By, Started and Completed date in the text space at the top of the screen. To view the report, select the hyperlink text listed under the Name column. To remove the report, select the “Delete” hyperlink to the far right under the Action column. The refresh button is available in the bottom left of the window.

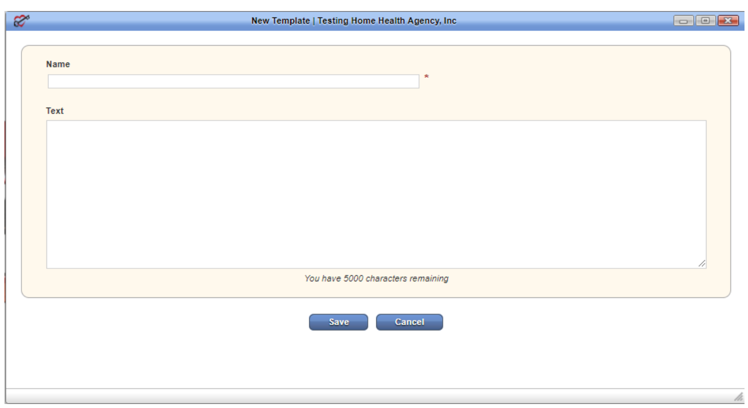


ADDING TEMPLATES:

Admin/New/Template



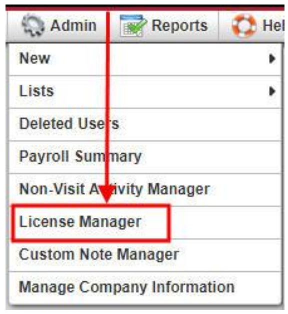
The window below will appear. Create a Name for the template. Then write the template inside the white Text section. The section is limited to 5000 characters. Once completed, select the "Save" button.



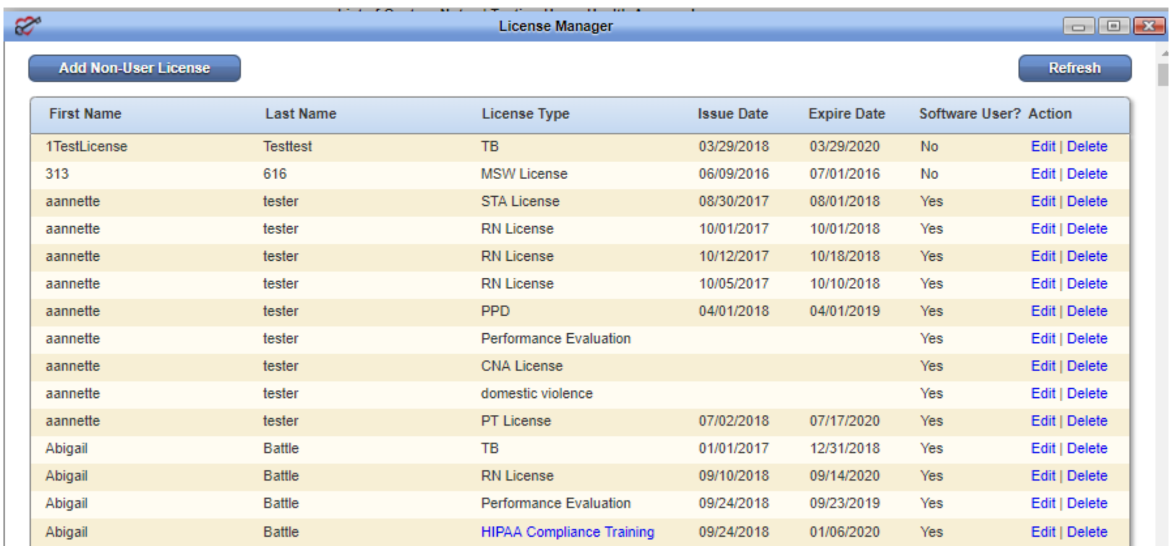
NOTE: Templates can be used to save time for writing orders, goals, care plans, physician statements, narratives and other places inside visits.

LICENSE MANAGER:

Admin/License Manager

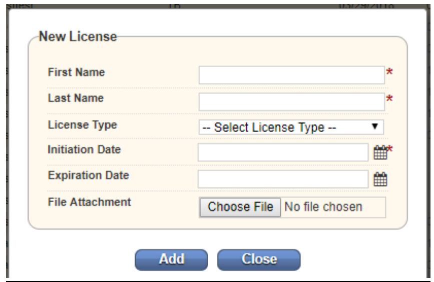


A window will open that will show all current user licenses. Select the “Refresh” button in the top right to make the list completely up to date.



First Name	Last Name	License Type	Issue Date	Expire Date	Software User?	Action
1TestLicense	Testtest	TB	03/29/2018	03/29/2020	No	Edit | Delete
313	616	MSW License	06/09/2016	07/01/2016	No	Edit | Delete
aannette	tester	STA License	08/30/2017	08/01/2018	Yes	Edit | Delete
aannette	tester	RN License	10/01/2017	10/01/2018	Yes	Edit | Delete
aannette	tester	RN License	10/12/2017	10/18/2018	Yes	Edit | Delete
aannette	tester	RN License	10/05/2017	10/10/2018	Yes	Edit | Delete
aannette	tester	PPD	04/01/2018	04/01/2019	Yes	Edit | Delete
aannette	tester	Performance Evaluation			Yes	Edit | Delete
aannette	tester	CNA License			Yes	Edit | Delete
aannette	tester	domestic violence			Yes	Edit | Delete
aannette	tester	PT License	07/02/2018	07/17/2020	Yes	Edit | Delete
Abigail	Battle	TB	01/01/2017	12/31/2018	Yes	Edit | Delete
Abigail	Battle	RN License	09/10/2018	09/14/2020	Yes	Edit | Delete
Abigail	Battle	Performance Evaluation	09/24/2018	09/23/2019	Yes	Edit | Delete
Abigail	Battle	HIPAA Compliance Training	09/24/2018	01/06/2020	Yes	Edit | Delete

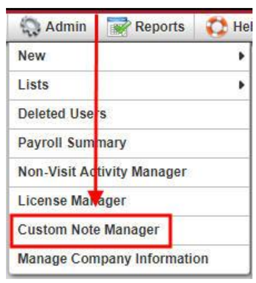
Select the “Add Non-User License” button in the top left. A New License window opens. First, Last Name and Initiation Date are required. Choose the License Type from the drop-down menu. Choose an Expiration Date or add a File Attachment by selecting the “Choose File” button (optional). Select the “Add” button when complete.



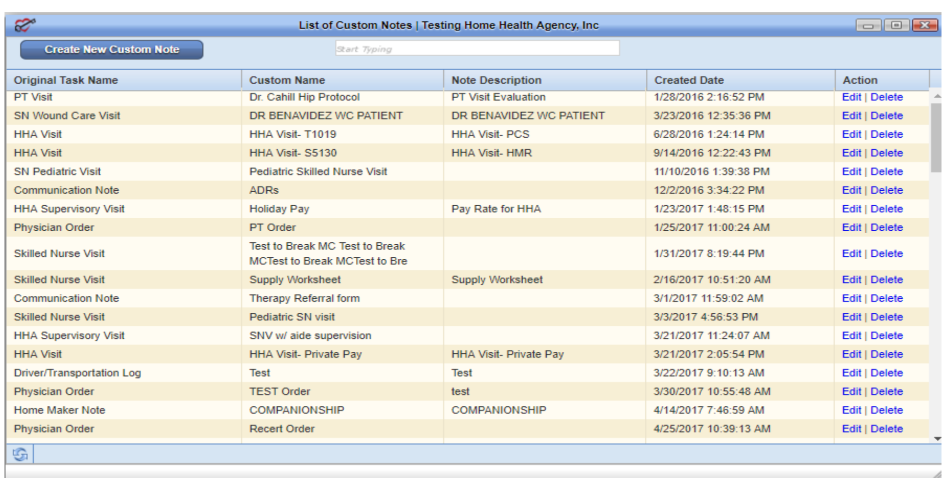
Select the “Edit” hyperlink on the far right under the Action column to edit the information from the previous screenshot or “Delete” to remove the non-user license altogether.

CUSTOM NOTE MANAGER:

Admin/Custom Note Manger



A window will open that will show all active custom notes. To make changes to any currently listed notes, select the “Edit” hyperlink to the right under the Action column. To remove any notes, select the “Delete” hyperlink under the same column.

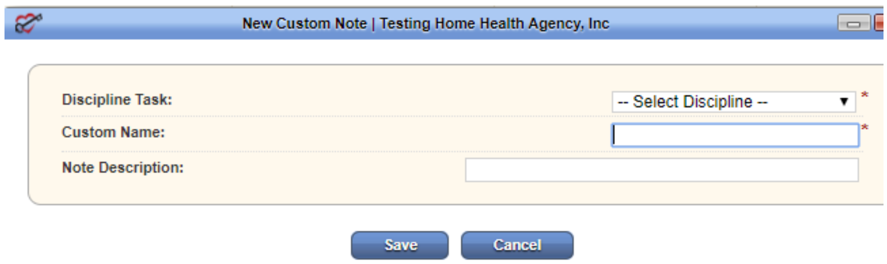


List of Custom Notes | Testing Home Health Agency, Inc

Create New Custom Note

Original Task Name	Custom Name	Note Description	Created Date	Action
PT Visit	Dr. Cahill Hip Protocol	PT Visit Evaluation	1/28/2016 2:16:52 PM	Edit | Delete
SN Wound Care Visit	DR BENAVIDEZ WC PATIENT	DR BENAVIDEZ WC PATIENT	3/23/2016 12:35:36 PM	Edit | Delete
HHA Visit	HHA Visit- T1019	HHA Visit- PCS	6/28/2016 1:24:14 PM	Edit | Delete
HHA Visit	HHA Visit- S5130	HHA Visit- HMR	9/14/2016 12:22:43 PM	Edit | Delete
SN Pediatric Visit	Pediatric Skilled Nurse Visit		11/10/2016 1:39:38 PM	Edit | Delete
Communication Note	ADRs		12/2/2016 3:34:22 PM	Edit | Delete
HHA Supervisory Visit	Holiday Pay	Pay Rate for HHA	1/23/2017 1:48:15 PM	Edit | Delete
Physician Order	PT Order		1/25/2017 11:00:24 AM	Edit | Delete
Skilled Nurse Visit	Test to Break MC Test to Break MCTest to Break MCTest to Bre		1/31/2017 8:19:44 PM	Edit | Delete
Skilled Nurse Visit	Supply Worksheet	Supply Worksheet	2/16/2017 10:51:20 AM	Edit | Delete
Communication Note	Therapy Referral form		3/1/2017 11:59:02 AM	Edit | Delete
Skilled Nurse Visit	Pediatric SN visit		3/3/2017 4:56:53 PM	Edit | Delete
HHA Supervisory Visit	SNV w/ aide supervision		3/21/2017 11:24:07 AM	Edit | Delete
HHA Visit	HHA Visit- Private Pay	HHA Visit- Private Pay	3/21/2017 2:05:54 PM	Edit | Delete
Driver/Transportation Log	Test	Test	3/22/2017 9:10:13 AM	Edit | Delete
Physician Order	TEST Order	test	3/30/2017 10:55:48 AM	Edit | Delete
Home Maker Note	COMPANIONSHIP	COMPANIONSHIP	4/14/2017 7:46:59 AM	Edit | Delete
Physician Order	Recert Order		4/25/2017 10:39:13 AM	Edit | Delete

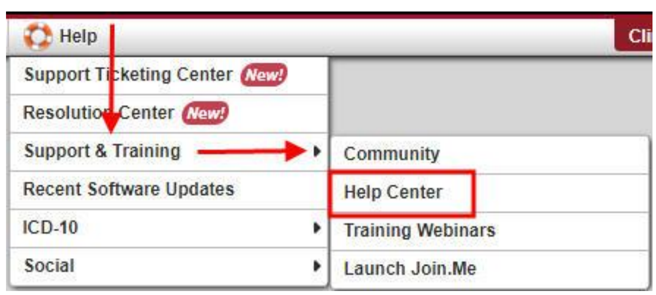
Select the “Create New Custom Note” button in the top left to add a new note. In the New Custom Note window, select the Discipline Task from the drop-down menu and enter the desired Custom Name with an optional Note Description. When complete, select the “Save” button at the bottom.



HELP CENTER:

Help/Support & Training/Help Center

A great resource that is available 24/7 is our Help Center. It is a place to get answers to frequently asked questions or watch videos of all Axxess products. It can be accessed by going to:



It is also available at https://www.axxess.com/help/