CLINICIAN TRAINING QUICK REFERENCE GUIDE

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Common Buttons & Icons

	Red Sticky Note - Return Reason		OASIS Warning
	Yellow Sticky Note - Specifically to That Visit		Fatal OASIS error
	Blue Sticky Note – Tied to Every Visit In An Episode		Print
	Refresh		

LOGGING IN

1. Go to www.axxess.com and select **Client Login**.
2. Enter in the email address and password. Select **Secure Login. NOTE**: If password is forgotten, select **Forgot your Password** and a link will be sent to this email address.
3. Confirmation Login Successful. Select **OK.**

CLINICIAN PLANNER

Five windows:

1. Today's Visit Schedule - Red dots are on the dates with visits.
    a. Select day on calendar.
    b. Select Task.
    c. Select Patient Chart.
2. Today's Visits Map

Green – Current Location, Red – Visit Location, Blue – Selected Visit (marker)

a. Select marker.
b. Select **Get Directions**.

3. Unread Messages – Selecting a message takes users directly to the messaging center.
4. Past-Due Visits – Select "Open" tab to go to the note.
5. Alerts – Select "Open" tab to go to note.
    a. Hover over the red sticky note.
    b. Select **View Comments**. If necessary, write in response and select **Add Comment.**

DASHBOARD

There are five tiles. **NOTE**: Four additional tiles may be listed based on permissions.

1. Welcome Panel
2. Date/Time and Weather
3. Messages
4. News/Updates
5. My Scheduled Tasks:
    a. Select **More**.
    b. Decide on how to view data, select **Group By Patient, Group By Date** or **Group By Task.**
    c. Select Missed Visit Form.
        i. Select whether Order Generated or Physician Office Notified.
        ii. Choose Reason and enter any Comments.
        iii. Enter Staff Signature and Date (autogenerates to today).
        iv. Select **Submit**.

EDIT PROFILE

Home/My Account/Edit Profile

1. Update Password, Electronic Signature, Address, Phone Numbers or Software Language (English or Español).
2. Select **Save**.

NOTE: If signature is forgotten, it must be reset.

RESET SIGNATURE

Home/My Account/Reset Signature

1. Select **Reset Signature**.

MY MONTHLY CALENDAR

Home/My Monthly Calendar

1. Select Task to complete note/visit.
2. If necessary, select Missed Visit Form and complete.

PATIENT CHARTS

Patient/Patient Charts

1. Choose Branch, Status, Filter (payer) and/or type any part of patient name.
2. Select Patient.
    a. Choose discipline (Show) and range (Date).
    b. Select visit or note hyperlink.
    c. Menu/Details.

QUICK REPORTS

Patient Profile - PDF print out of patient information.

Medication Profile

1. Select **Add Medication**.
    a. Enter Start Date and (optional) DC Through Date.
    b. Start typing the medication, then select **Search for Medication**. Select med from drop-down box. **NOTE**: Medications not listed can be added. However, only medications selected from the dropdown will be checked for drug interactions.
    c. Enter Amount.
    d. Start typing name of Physician and select from drop-down box.
    e. Suggested Classifications will be listed if database med chosen.
    f. Enter frequency (shorthand accepted), Route and choose Type.
    g. Check box depending on whether new medication creates order.
    h. Select **Save & Add Another** for additional medications or **Save & Exit.**
2. Select **Drug Interactions.**
    a. Check medication boxes.
    b. Select **Check Interactions.**
    c. Drug-Drug Interactions PDF generates.
3. Select **Sign Medication Profile.**
    a. Enter Signature and Date.
    b. Select **Sign.**

Select **Edit**, **Delete** or **Discontinue** to make changes. Select Signed Medication Profiles to see who signed and when.

Allergy Profile

1. Select **Add Allergy.**
2. Write in Name and Type.
3. Select **Save & Add Another** for additional allergies or **Save & Exit.**

Select **Edit** or **Delete** to make changes.

Immunization Profile

1. Select **Add Immunization**.
2. Choose the Type of Immunization and whom it was Administered By.
3. Select Date Administered. **Save** or **Save & Add Another** to continue with additional immunization.
    a. Delete or Inactivate from active list.
    b. **Decline/Contraindicate Immunization.** Choose Type of Immunization and select Date Documented. Check Declined or Contraindication. **Save** or **Save & Add Another** to continue with additional declined immunization.

Inactive Immunizations – to reactivate, select Activate.

Communication Notes

Choose Episode. Start typing either User, Date or Status to narrow down. Select **Edit** or **Delete** to update.

1. Select **New Communication Note.**
2. Choose Episode Associated.
3. Enter Communication Text.
4. Enter Staff Signature and Date.
5. Select either **Save** or **Complete**.

Orders and Care Plans

1. Choose Date Range then select **Generate.**
2. Select Print icon to view PDF version.

Plan of Care (POC) Summary

1. Select **Current** to view all Current Orders by Episode.
2. Select **Discontinued** to view all Current Orders by Episode with a status of Discontinue.

Vital Sign Charts - Select **Vital Sign Charts** or **Vital Signs Log.**

PERMISSIONS-BASED QUICK REPORTS

Authorizations Listing

Start typing either Authorization Number, Payer, Type, Start or End Date, Authorized Units, Used, Unused or Unit to narrow down. Select Edit or Delete to update.

1. Select **Add Authorization**.
2. Choose the Authorization Type and Status.
3. Enter Authorization Number.
4. Select Start and End Date. **NOTE:** The start date cannot be changed once the authorization is created.
5. Select Discipline, enter Authorized Units and choose Unit Type. **NOTE:** Hourly is for recording authorization only, the system currently doesn't provide tracking hours.
6. Select **Add More Disciplines** (if necessary).
7. Enter Comment and/or add Attachments.
8. Select **Save.**

60 Day Summaries

- Start typing either the Employee Name, Visit or Signature Date and Episode dates or Physician Name.
- Select Print icon to view PDF version.

Triage Classification

- PDF version of patient's Emergency Preparedness Plan/Triage Classification.
- Select **Print**.

Deleted Tasks/Documents - *See Deleting a Visit below*

PATIENT CHART TABS

New Orders

1. Select **New Order.**
2. Choose Episode Associated and enter Time.
3. Enter Summary/Title.
4. Select Order Type.
    a. Medication Orders - Add new medication(s), update or discontinue medication(s).
    b. Plan of Care Orders - Update the Plan of Care.
    c. Discipline Frequency - Add, update or discontinue frequency of visits by discipline.
    d. Supply Manager - Add Supplies.
    e. Other - Anything not previously mentioned. **NOTE**: Anything entered in this type will *not* flow to the POC Summary.
5. Enter Clinician Signature, Signature Date and Time.
6. Select either **Save** or **Create Order.**

New Communication Note - *See Communication Notes above*.

Reassign Schedules

1. Select **Reassign Schedules.**
2. Choose Employee From and Employee To.
3. Confirm Date From and Date To.
4. Select **Reassign.**

Upload Document

Upload Document/New Document

1. Select **Choose Files.**
2. Find files saved on computer.
3. Enter Document Name.
4. Choose Upload Type.
5. Select **Submit**.

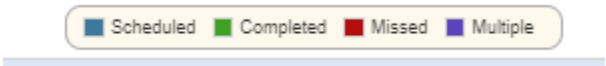
Upload Document/View Documents

1. Start typing either Document Name, Type, Created or Modified to narrow down.
2. Select Document Name to download PDF.

3. Select **Edit** or **Delete** to update.

SCHEDULE ACTIVITY

1. In Patient Charts, select **Schedule Activity.**
2. Current episode defaults.
3. Color-coded visits appear on the calendar and are the print color of the task.



SCHEDULING VISIT(S)

1. Select date on the calendar.
2. Tab below expands. **NOTE**: Section will also expand by selecting the "Show Scheduler" tab.
3. Select discipline.
4. Choose Task and User.
5. Select **Save.**

To schedule multiple visits (same type) for the same user:
Schedule Manager/Schedule Employee.

1. Choose User/Employee and Visit Type.
2. Select day(s) on the calendar.
3. Select **Save.**

DELETING A VISIT (PERMISSIONS-BASED)

1. Patient Charts/Menu/Delete
2. Select **OK.**

To retrieve deleted visit: *Patient Charts/Quick Reports For This Patient/Deleted Tasks_Documents*

1. Start Typing the Task/Document, Scheduled Date, Status or User to narrow down.
2. Select **Restore**.

OASIS-D START OF CARE

1. Patient Charts or Schedule Center and select OASIS D Start of Care. **NOTE**: If previously with agency, load previous SOC Assessment by choosing from dropdown and selecting **Load Assessment.**
2. Answer assessment questions. **NOTE**: Some information is previously entered from referral/admission.

Green Boxes – OASIS M questions.
Purple Boxes – Generate POC pathways.
Grey Boxes - Pull to POC.
Blue Boxes – Physical Assessment.

3. Choice to enter orders at bottom of each tab based on assessment answers. Replace asterisks ** with patient specific information.
4. When the assessment is completed, select **Check for Errors**.
    a. Warnings have the triangle icon.
    b. Errors have stop icon. Cannot finish OASIS with error messages.
    c. Double check HIPPS Code, OASIS Claim Matching Key, and HHRG scores all have a code.
5. Select **Create 485 PLAN OF CARE** to create a 485/POC generated from assessment. **NOTE**: There is an optional **OASIS Scrubber** that will look for any inconsistencies or flags that the agency may want to address.
6. Fill out the Time In/Out. Sign, date and select **Finish.**

NOTE: If the agency keeps track of travel time, surcharges and mileage must also be entered.

HELP CENTER

Our Help Center is a great resource that is available 24/7. Here, you can get answers to frequently asked questions or watch videos of all Axxess solutions. It can be accessed by going to *Help/Support & Training/Help Center* or also available at https://www.axxess.com/help/