

OVERVIEW QUICK REFERENCE GUIDE

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LOGIN TO AXXESS

1. Navigate to www.axxess.com
2. Select **Client Login**.
3. Input credentials.
4. Select **Secure Login**.

CLINICIAN PLANNER

The Clinician Planner displays pertinent information specific to a user. Shortcuts have been placed on the left side of the page to allow for easy access to the Axxess applications the agency is using.

- Clinicians are also able to see upcoming visits, past due visits, unread messages, and a map of today's visits.
- To access patient charts, document a visit or bill for a particular patient, select the appropriate Axxess application on the left side of the page.

Navigation Menu

Once logged in, the navigation menu at the top will allow for easy access throughout the system.

Home

The Home menu allows access to the following actions based on permissions granted to the user.

- My Account - Quickly edit the users profile or reset signature.
- My Dashboard - Opens the AgencyCore dashboard.
- My Messages - Opens the Message Center to view/send messages.
- My Schedule / Tasks - View the user's schedule/tasks in a list view.
- Notes Pending Co-Signature - Sign notes that are marked to require a co-signature.
- My Monthly Calendar - View the user's schedule/tasks in a monthly calendar view.
- Quality Assurance (QA) Center - View tasks that are pending approval by the QA Nurse.
- Clinician Planner - Access the clinician planner dashboard.

Create

The Create menu allows access to the following actions based on permissions granted to the user.

- New - Add new items into the system, such as a Referral, Physician, Communication Note, etc.
- OASIS Export - View OASIS assessments that are ready to be exported and submitted to CMS.

View

The View menu allows access to the following actions based on permissions granted to the user.

- Lists - View items in the system, such as a list of Referrals, Patients, Physicians, Insurances/Payers, etc.
- Blank Forms - View blank versions of visits to be printed and filled out manually.
- Archived Insurances - View insurances that have been archived (no longer in use).
- Exported OASIS - Review, cancel any previously exported OASIS or edit correction numbers.
- Not Exported OASIS - View OASIS that were not exported from the system.
- Past Due Recerts - View patients that have a recertification past their due date.
- Upcoming Recerts - Review patients that have an upcoming recertification date within the next 30 days.
- Orders Management - View orders that are pending co-signature, pending physician signature, orders to be sent and orders history.
- Print Queue - Displays tasks that are ready to be printed and delivered to the appropriate recipient.

Patients

The Patient menu allows access to the following actions based on permissions granted to the user.

- Patient Charts - View patient charts within the system, including active, pending, discharged and non-admitted patients.

- Existing Referrals - View a list of pending referrals and begin the admission process.
- Pending Admissions - View and add a new patient for admission into the system.
- Non-Admissions - Inclusive list of all non-admissions logged in the system. From this screen, a user can also admit a patient if they were marked incorrectly.
- Deleted Patients - Patients that have been deleted from the system are visible in this screen and are able to be restored, if necessary.
- Hospitalization Logs - Patients that have been transferred to the hospital by completing a Transfer OASIS are visible in this screen for tracking purposes.

Schedule

The Schedule menu allows access to the following actions based on permissions granted to the user.

- My Schedule / Tasks - View the user's schedule / tasks in a list view.
- Notes Pending Co-Signature - Notes that require a Co-Signature will be listed in this section until signed by the responsible co-signer.
- Schedule Center - Review a patient's schedule as well as completed visits and miscellaneous episode information.
- Reassign Schedule - Reassign an employee's schedule to another employee for a specified date range.
- Schedule Report - Generate a schedule report by Status, Discipline, Clinician or Patient.
- Schedule Deviation Report - This report will display visits that were completed outside of the originally scheduled date.

AxxessCARE

The AxxessCARE menu allows access to the following actions based on permissions granted to the user.

- AxxessCARE Scheduler - Post multiple visits to AxxessCARE that require coverage.
- Posted Visits Summary - Review the visits that have been posted to AxxessCARE along with their current visit status and assigned clinician.

NOTE: Only agencies in specific states will have the option to “Post to AxxessCARE.” Other states are coming soon.

Billing

The Billing menu allows access to the following actions based on permissions granted to the user.

- Medicare / Medicare HMO - This menu provides the options to create claims, view claims history and review eligibility for Medicare / Medicare HMO clients.
- Managed Care / Other Insurances - This menu provides the options to create claims and review claims history for Managed Care / Other Insurances.
- All Claims - Central location to review claims regardless of insurance or bill type.
- Claim Submission History - Review submitted claims and the associated responses by Batch ID.
- Remittance Advice - Review notices of remittance and electronic fund transfers.

Admin

The Admin menu allows access to the following actions based on permissions granted to the user.

- New - Add new items into the system, such as a Referral, Facility, Pharmacy, Insurance / Payor, etc.
- Lists - View items in the system, such as a list of Referrals, Patients, Physicians, Insurances/Payors, etc.
- Deleted Users - Users that have been deleted from the system will appear in this screen for historical purposes. These users may also be restored from within this screen.
- Payroll Summary - Review unpaid visits and mark them as paid appropriately.
- Non-Visit Activity Manager - Central entry point for non-visit activity as well as the ability to mark as paid.
- License Manager - Central location to review all licenses entered into the system as well as the ability to “Add Non-User License” to the system.

- Custom Note Manager - Custom notes created from a system-generated note are visible from within this screen, allowing the ability to rename a particular note.
- Manage Company Information - Company-wide settings and information are managed from this screen. **NOTE:** An administrator's signature is required to access this screen.

Reports

The Reports menu allows access to the following actions based on permissions granted to the user.

- Report Center - Provides access to reports available within the system.
- Completed Reports - Some reports will be queued until compiled. Once the data has been compiled, the report will be available from this section.

Help

The Help menu allows access to the following actions based on permissions granted to the user.

- Support Ticketing Center - Direct link to submit a support ticket for a current issue.
- Resolution Center - Direct link to the Help Center showing the recent software updates.
- Support & Training - Allows access to the Help Center, training webinars and the community.
- Recent Software Updates - To see recent software updates, please use the Resolution Center listed above in the menu.
- ICD-10 - Reference material for ICD-10 including a lookup and a ICD-9 to ICD-10 crosswalk are available from this menu.
- Social - Connect with Axxess on social media using the quick links provided in this menu.

RESET SIGNATURE

Home/My Account/Reset Signature.

1. Select **Reset Signature** and a link will be sent to the email address associated with the account.

2. Review the system-generated email that was sent to the user's email address for a personalized link.
3. Web browser window will open prompting to verify the information and enter new signature.
4. After inputting a new signature, select **Change Signature** and a prompt will display confirming the change was successful.
5. Close browser and log back into Axxess to use the updated signature.

RESET LOGIN PASSWORD

To reset the Axxess login password, follow one of the methods listed below.

Current Login Password is Unknown

1. Navigate to the login page and select **Forgot your Password?**
2. Continue to follow the prompts to enter the email address used to login to Axxess and select **Send**. This will send a password reset link to the user's email address.

Current Login Password is Known

Home/My Account/Edit Profile.

1. Input the current password and new password desired in the boxes provided. Select **Save**.

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 of Axxess solutions. It can be accessed by going to *Help/Support & Training/Help Center* or also available at <https://www.axxess.com/help/>