HOMECARE OFFICE STAFF (INTAKE AND SCHEDULING) TRAINING MANUAL

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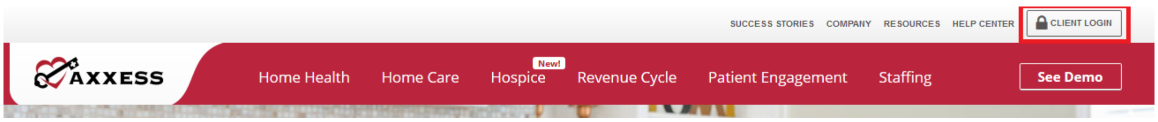
Logging Into Axxess

To access Axxess HomeCare, open the Internet browser (Chrome and Firefox recommended) and type in the address www.Axxess.com When the Home screen appears, select the “Client Login” button at the top right-hand side of the webpage.



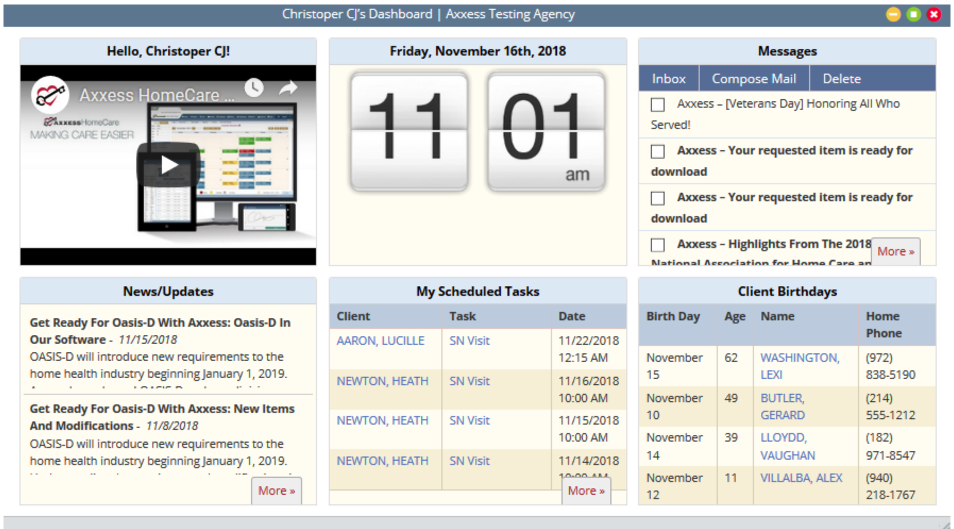
Next, the sign-in page will appear where the username and password fields are required. The username is the email address associated with the Axxess HomeCare user account. Once the username and password have been entered, select “Secure Login” to enter Axxess’ software.

NOTE: For resetting the password, See Overview.

After successfully logging in, a user acceptance message will display. Select “OK” to accept the message or “Cancel” to exit the application.

The Clinician Planner displays. Select the appropriate Axxess application on the left side of the page to perform the Intake and Scheduling process.

Dashboard



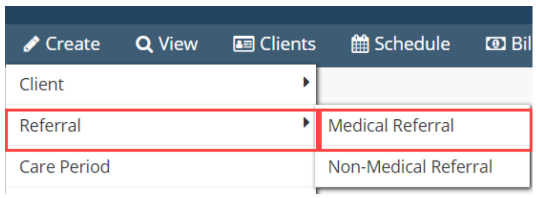
The dashboard can display six tiles. Three of these tiles are default and the remaining three will be based on user permissions.

- Welcome Panel – The center of the screen will display items for subscribers to Axxess products. Items will consist of everything from important announcements to in depth training videos.
- Local – This box will display the current date and time for the current location.
- Messages – HIPAA-compliant email messaging center that allows all agency users to communicate in a secure manner. When the user receives messages, notifications will be sent to the user's email assigned to their account.
- News/Updates – Links to Axxess generated blog posts, educational articles, regulatory updates, and other important information.
- My Scheduled Tasks – Electronic "To-Do" list. Quickly access a client chart and tasks. The tile will display the five most recent clients and their tasks.
- Client Birthdays – This is a quick reminder of the clients who will celebrate birthdays in the upcoming week/month, so that thoughtful birthday cards can be sent out, optimizing positive client/provider relationships.

Referral Entry

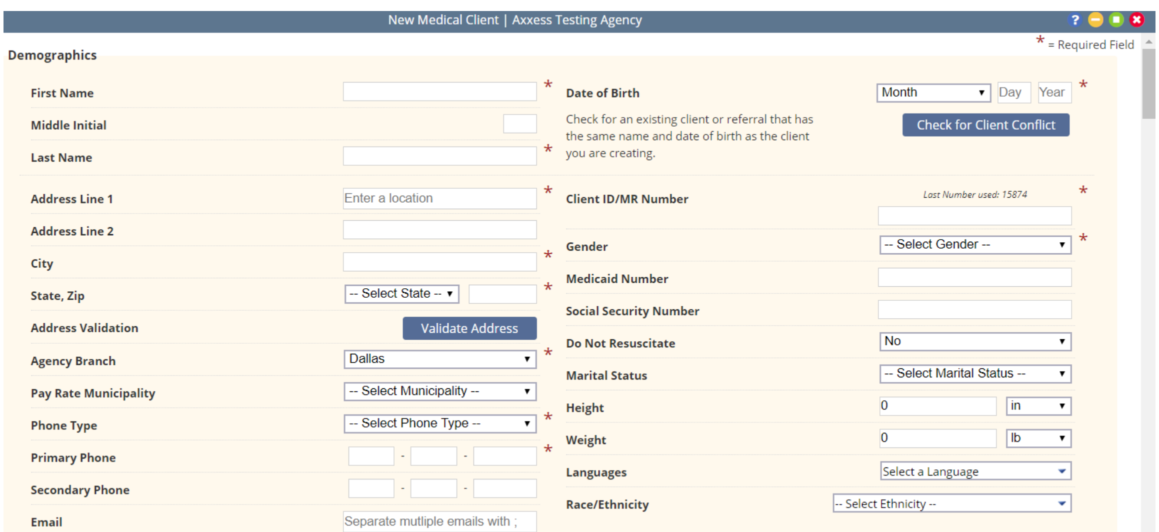
Create/Referral/Medical Client

There are two options to add a Client into Axxess HomeCare. The path chosen will depend on information received at time of the referral as well as by the agency process. To add a new client receiving skilled services as a "Referral," the proper location is in Create/Referral/Medical Referral.



The referral entry details page will populate. Sections with a red asterisk* indicate that the information is required to save the page.

Demographics – Section contains geographical and contact details pertaining to the client.

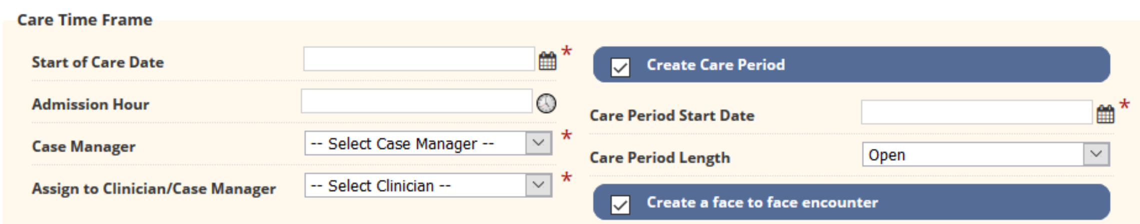


Items noted with a red asterisk in the Demographics section include:

- Enter Client's First Name/Last Name/Gender and Date of Birth.
- Address Line 1 - Where the client will be receiving care, City, State and Zip.
    - Once the client's address is entered, "Validate Address" can be selected to verify that the details entered are for a valid address.
- Agency Branch - The branch the client will be receiving care through.

- Pay Rate Municipality - This is for areas that pay a different minimum rate for a service area pay rates for employees.
- Primary Phone - The client's primary phone number.
- Email - The client's email address section allows for multiple email addresses to be added by using commas to separate each email.
- Date of Birth - The client's birth date is entered in this section.
    - "Check for Client Conflict" is a system check for an existing with the same name and date of birth as the client being entered.
- Do No Resuscitate - "Yes" or "No" options are available to indicate if the client has a DNR request.

Care Time Frame – This section is for setting up the timeframe in which the client will receive care.



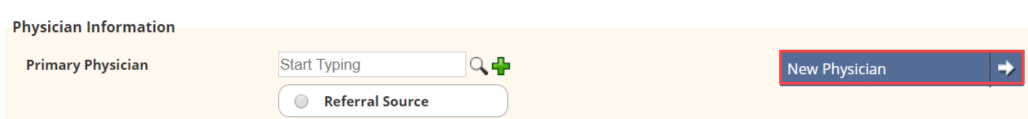
- Start of Care Date - The date the Client will begin receiving services.

The "Create Care Period" must be checked to create the client's initial Care Period once admitted. Care periods are a pre-requisite to scheduling services.

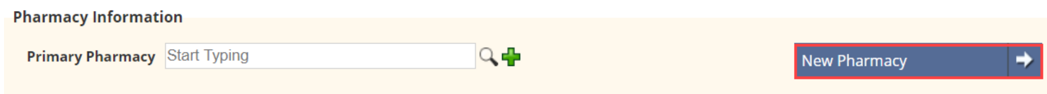
- Care Period Start Date - This is usually the Start of Care Date.
- Care Period Length - While not required, if creating the care period, the length should be indicated.
- Face to Face Encounter - When selected, the system will create a Face to Face Encounter task for the agency to send/track to a physician.

Physician Information - The doctor that will sign the orders is selected in this section. It may or may not be different than the referring physician.

- If the physician is not found, the ability to add a New Physician is available.

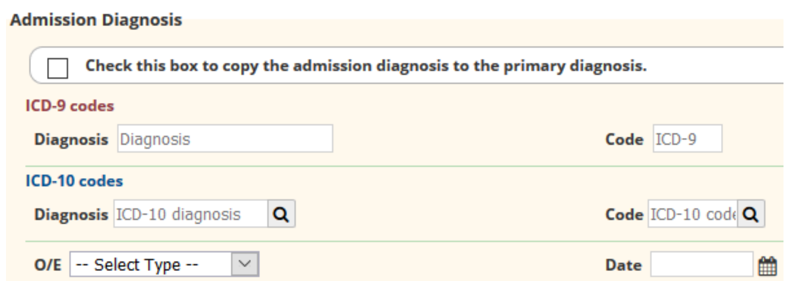


Pharmacy Information – The client's Pharmacy information which will populate the Medication Profile is entered in this section.

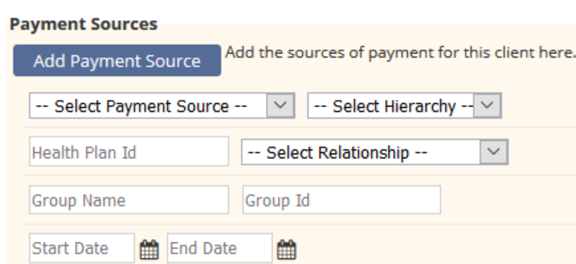


Admission Diagnosis – The ability to populate the Admission Diagnosis Code upon Intake of a New Medical Client is available.

- Checking the top box allows the diagnosis code placed in as the Admission Diagnosis to be copied over as the Primary Diagnosis.
- Both ICD-9 and ICD-10 diagnosis types are available to select.



Payment Sources - Encompasses details of how the client will be billed. It is not required at initial client intake; however, it is beneficial to input as soon as it is obtained.

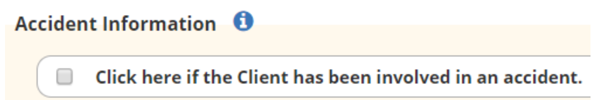


- Utilize the "Add Payment Source" to add multiple payer sources.
- "Select Payment Source" - Indicate the payer source for the client. If it is not already in the database, an option to add a new one is available.
- "Select Hierarchy" - Indicate the hierarchy the payment source is for the client.
- Relationship - Select the client's relationship to the insurance.

- The following additional Payment Source Information may be added: Plan ID, Group Name, Group ID, Start and End Date (If Applicable).

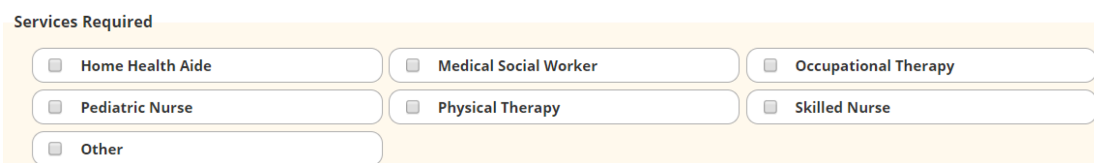
Accident Information – This section is completed if the client is receiving services due to an accident.

Note: Hovering over the will provide an elaboration pertaining to the section.

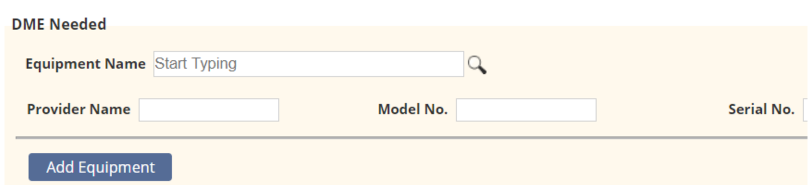


- Checking the box will generate additional fields to address pertaining to the accident.

Services Required - This section is for indicating the type of service the client should be receiving. The options are determined by the information entered inside Manage Company Information.

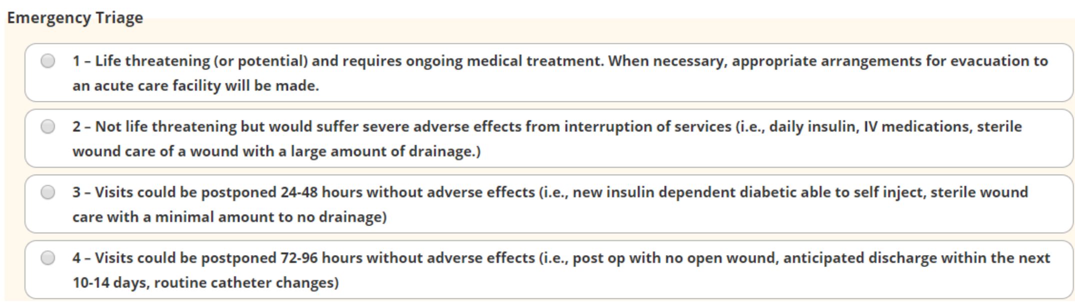


DME Needed – Durable Medical Equipment for the client is selected in this section. The options are determined by the information entered inside Manage Company Information.



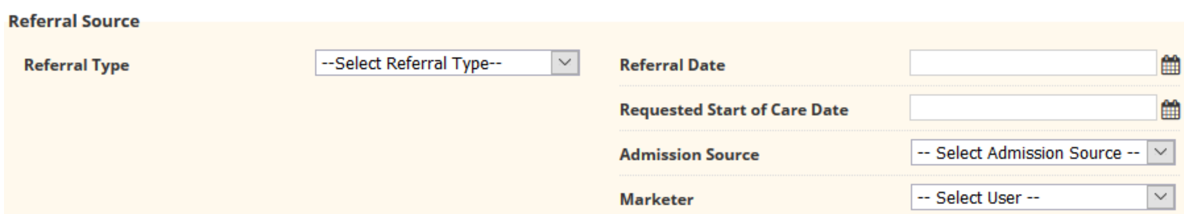
If an item is not in the DME list it may be added in text format in the Non-Standard comment box.

Emergency Triage Level – This section allows the ability to document the process during a state of emergency. This is a required field for Intake.



Evacuation - This section is applied to clients that live in areas that require evacuation necessities. This is based upon the Agency policy and procedures.

Referral Source – This section is part of the tracking process for new referrals.



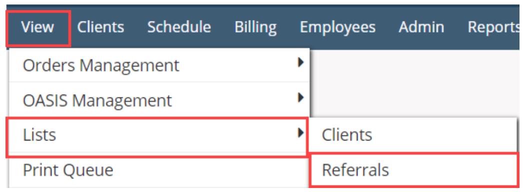
- Referral Type - Describes what external entity sent the referral.
- Referral Date - Enter the date the agency received the referral from the referral source.
- Referral Start of Care Date - Requested date to begin services.
- Admission Source - Where the client came from (Clinic/Physician, Hospital, SNF, etc.).
- Marketer - This is an internal user associated to the referral source.

"Save" - This button places the client in the Pending Admission status.
"Admit" - This button admits the client and places the client in the Client Center.

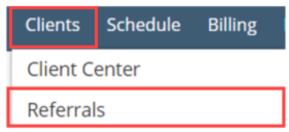
Viewing Existing Referrals

View/Lists/Referrals

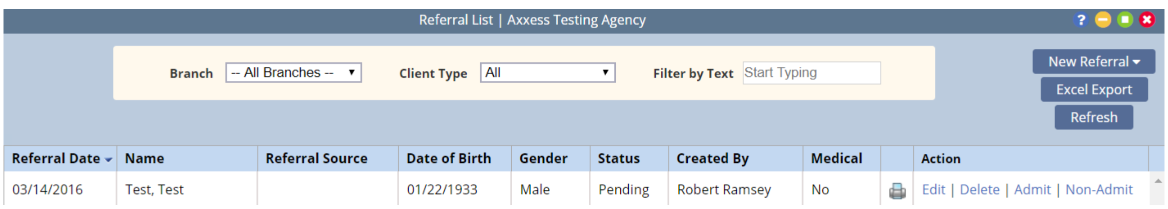
After the client's referral has been created, the next step is admitting the client. There are two ways to locate the saved referral to proceed with the admission.



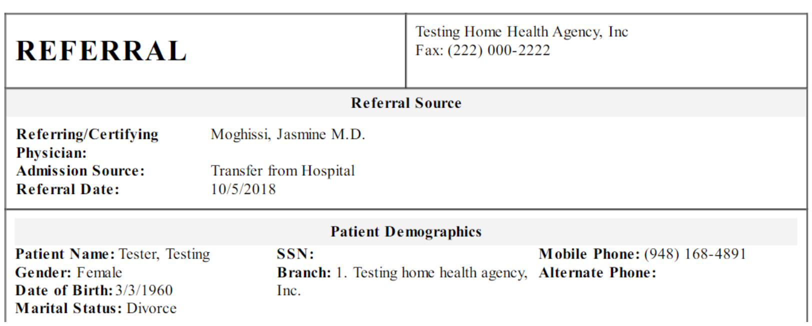
Client/ Referrals



The “Referral List” will appear with the client’s referral date, referral source, date of birth, gender and name of the person who entered the initial referral. There will also be a column indicating if the client is Medical “Yes” or “No.”



The option to add a New Referral is available in this window by selecting the “New Referral” button. The Printer icon gives a preview of the referral document. It is the client’s Face Sheet, which is only available in this format prior to admitting the client. The document can be Printed or Saved.



REFERRAL

Testing Home Health Agency, Inc
Fax: (222) 000-2222

Referral Source

Referring/Certifying Physician: Moghissi, Jasmine M.D.
Admission Source: Transfer from Hospital
Referral Date: 10/5/2018

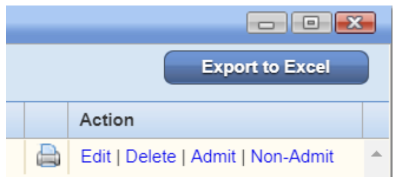
Patient Demographics

Patient Name: Tester, Testing
Gender: Female
Date of Birth: 3/3/1960
Marital Status: Divorce
SSN:
Branch: 1. Testing home health agency, Inc.
Mobile Phone: (948) 168-4891
Alternate Phone:

The Action column contains a variety of action items for the client’s referral:

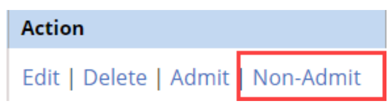
- Edit - Enables the ability to modify referral details prior to admitting the client.

- Delete - Removes the client from the system completely. Please note, deleting the referral means the client will not be visible in any reports in the database.
- Admit - Generates all required information required to admit the client.
- Non-Admit - This removes the client from the list of referrals available for admission.



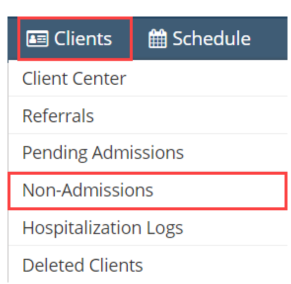
Non-Admitting a Referral

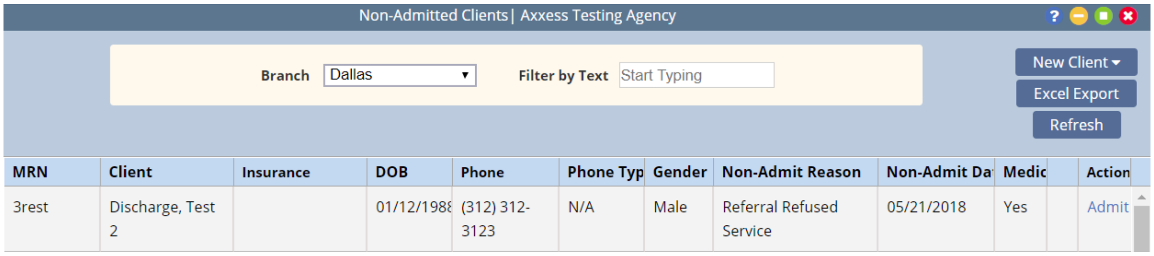
To Non-Admit a client, the option must be selected in the Actions column in the Referral List.



The Non-Admission date and Reason are required before the referral can be processed into Non-Admit status. A section for comments will be available.

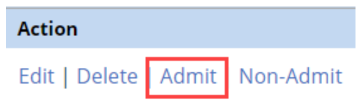
Once the Non-Admission is processed, the list of Non-Admitted clients can be found in *Clients/Non-Admissions.*





Admitting a Referral

In the Referral List, the “Admit” hyperlink under the Action column will update the client to an Active admitted status.



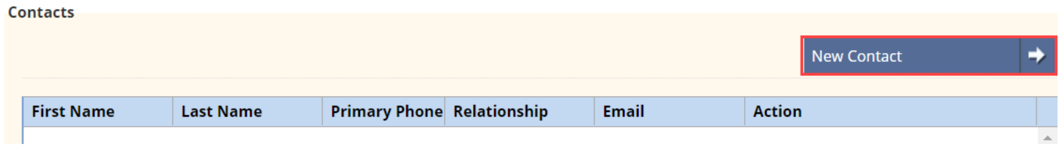
The Demographics section will contain all the information entered during the referral process. Below are sections that were not in the referral process that will need to be addressed to admit the client:

- Client ID/MRN Number - This is an agency created Medical Record Number. This is required before admitting the client.

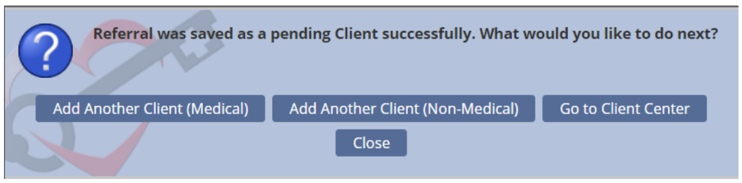
- Case Manager - The individual who will be overseeing the client’s case.
- Assign to Clinician/Case Manager - The Clinician/Case Manager that the Initial Care Period and/or Face To Face will be assigned to.

- Evacuation Zone - The client’s mobile phone number is required upon admission.

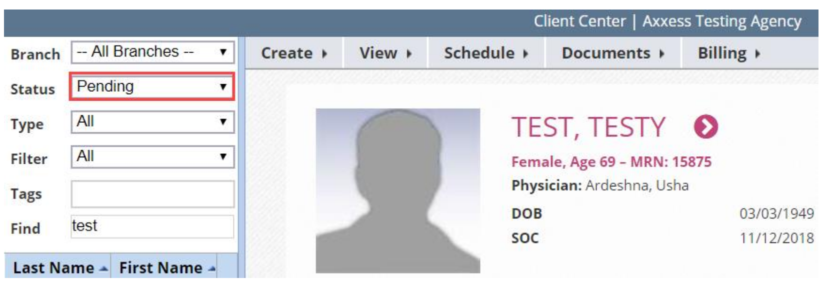
- Emergency Contacts - Emergency Contacts can only be added to the referral after it has been created.



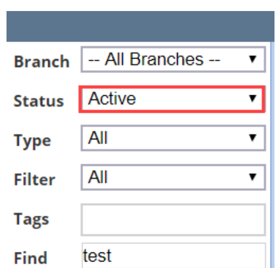
Selecting “Save” instead of “Admit” will generate a message with further options for proceeding.



Selecting “Go to Client Center” will load the Client Center with the Pending status selected and the client’s profile selected.



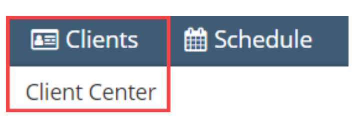
Selecting “Admit” will move the client into the Client Center with an Active status.



Introduction To Client Center

Clients/Clients Center

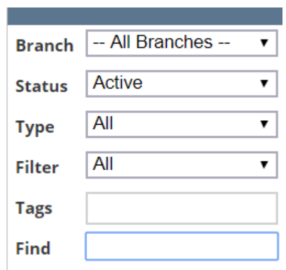
The Client Center is the client’s electronic medical record.



Client Center Filters

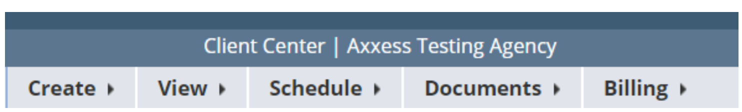
On the right-hand side of the Client Center window, there are parameters available to further narrow the selection when searching for a client.

- Branch - This option allows the user to pick the client's branch.
- Type – This option permits the ability to filter for Medical, Non-Medical or All types of clients. The system will default to "All."
- Filter - This option allows the user to narrow down the by the payer.
- Tags - Allows filtering by tags the agency is using in the system.
- Find - Search client's name & list will appear when typing in letters by first or last name.



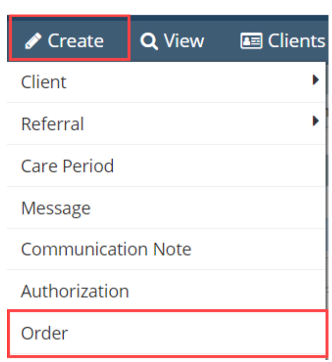
Client Center Top Menu

The Client Charts window has buttons at the top of the window that can be selected when adding details to the client's record.



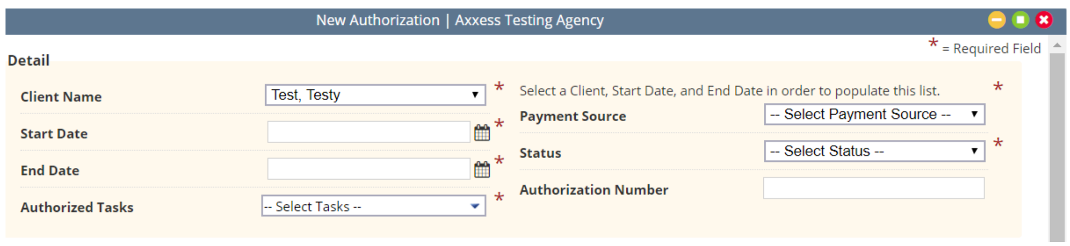
Create Tab

Order - This button provides the option to add a new order to the client's chart. An alternative route is *Create/Order*.

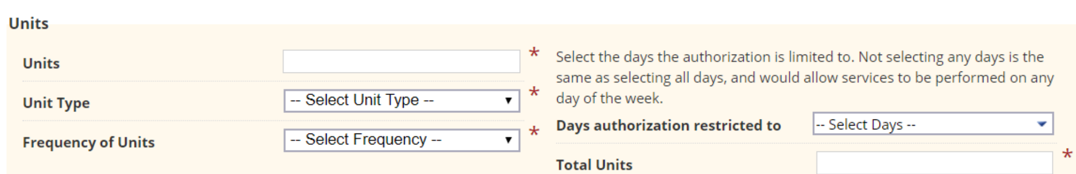


Communication Note - This button allows a coordination note to be entered into the client's chart. This note can be sent to another user within the agency by selecting "Send Note as Message."

Authorization - This option is used for clients with insurance payers which require authorization. The client's name will automatically appear when this option is selected inside that client's chart. The Start/End date ranges and Authorized Task options will be required depending on the type of authorization the client has.



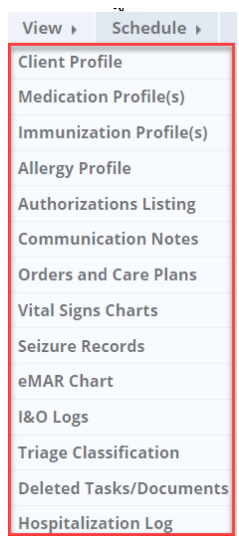
The Payment Source list pulls from the details indicated in the client's chart. The list will not generate until the Start/End dates are entered. The Status of the authorization can be indicated by selecting the options provided. Once the top section is completed, the Units section must be addressed by indicating the unit count, type, frequency and the total.



- Unit Types provides the option to indicate how the units will be measured.
- If there is a restriction on the days the authorization is used on, there is an opportunity to indicate so in the "Days authorization restriction" section.
- The Calculate Total button will use the details entered for the unit count, frequency and date range to determine how many units the authorization will be for.
- Selecting the "Per Hour" Unit Type will have the option to indicate how many times the visits will occur -depending on the frequency type selected. These details will be visible when the total is calculated.

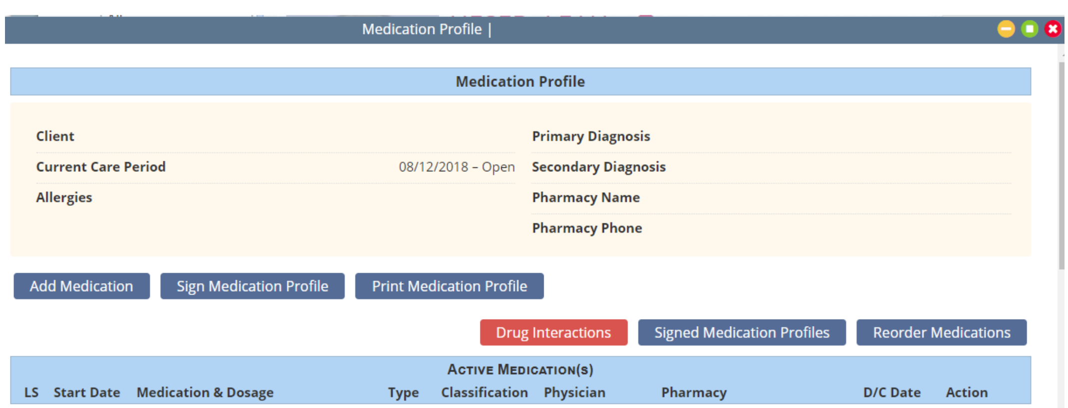
View Tab

The list of items under the View Tab will also be accessible from the Quick Reports.

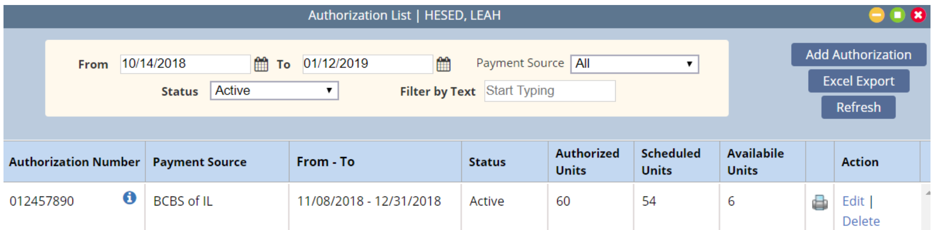


Client Profile - This section is the client's Client Profile Data Sheet. It is a PDF Synopsis of the client's profile. Upon viewing the profile may be Downloaded, Printed, or Closed.

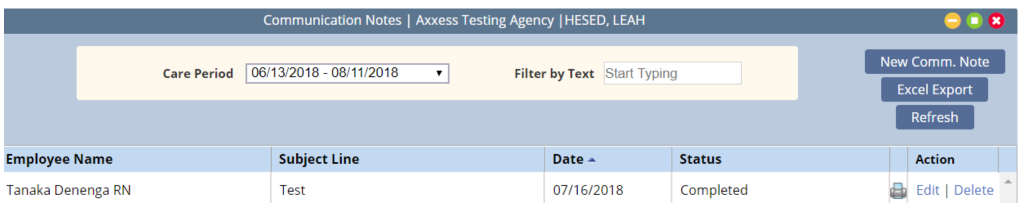
Medication Profile - This section contains details of the client's Medication Profile. Client medications are separated into Active and Discontinued Medications. Users have the option to: Add, Discontinue Activate medications, Sign Medication Profile, Print Profile, Check Drug Interactions, View Signed Medication Profiles, and Reorder Medications.



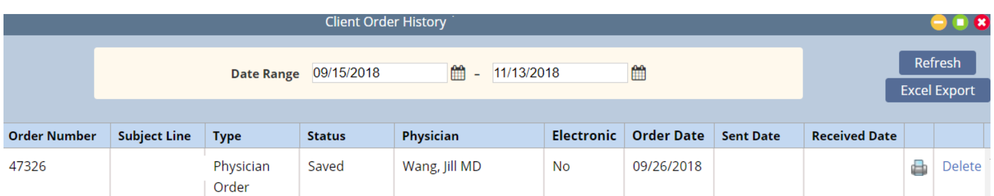
Authorization Listing - Provides the ability to search/view/edit existing authorizations as well as add new authorizations as needed. Actions include the ability to view/print, edit and delete existing authorizations as well as Add new authorizations.



Communication Notes - Provides ability to view existing Communication Notes as well as add new notes as needed. Users may search by care period and further filter by text. Existing communication notes will display in the grid. Actions include the ability to edit, delete and view existing notes in the PDF format.



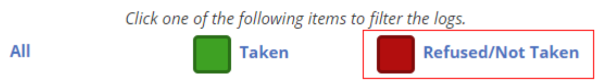
Orders and Care Plans - Provides ability to view existing Orders and Care Plans. Users may search by care period and further filter by text. Actions (permission based) include the ability to view/print and delete. The list of Orders and Care Plans may be exported to Excel.



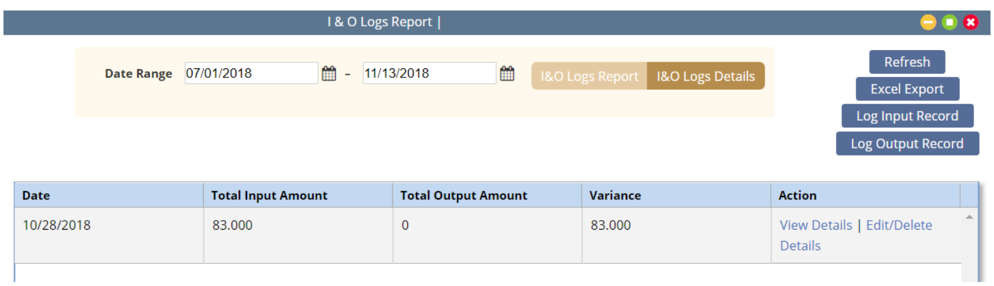
Vital Signs Chart - Displays the clients most recent 7 visits and the vitals entered during those visits. Vitals may be viewed in graph format as well. The Vital Sign Log contains Temperature, Weight, Respiratory Rate, Pain Level, Pulse, Blood Sugar, Blood Pressure, and an overall Report with all Vital Signs during the period.

Seizure Record - Displays a list of existing Seizure Records. The list may be searched by date range and further filtered by text. Individual record details may be viewed/printed via the printer icon and the entire list may be exported to excel. Available actions include the ability to Edit and/or Delete based on permissions.

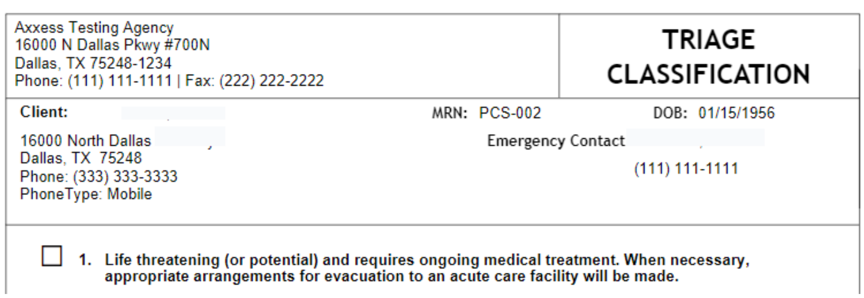
eMAR Chart - (Available for Medical Admissions only) Provides the ability to view the client's medication administration record. Display options include Daily, Weekly, or Monthly views. Client Medications are listed in the left column and the administration log displays green for taken meds and red for refused.



I&O Logs - Provides the ability to search and view recorded input and output values for the client. The default shows the summary, but users may view details by selecting the details link or toggle. Additional actions include the ability to edit/delete recorded values (permission based).



Triage Classification - This section contains information based on answers from client's profile Emergency Preparedness section.

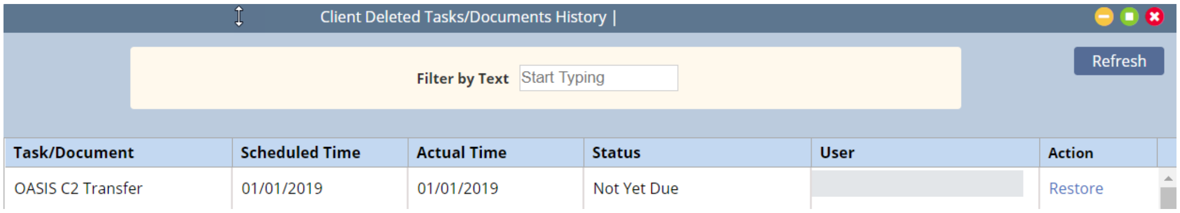

Axxess Testing Agency
16000 N Dallas Pkwy #700N
Dallas, TX 75248-1234
Phone: (111) 111-1111 | Fax: (222) 222-2222

TRIAGE CLASSIFICATION

Client: MRN: PCS-002 DOB: 01/15/1956
16000 North Dallas
Dallas, TX 75248
Phone: (333) 333-3333
PhoneType: Mobile
Emergency Contact
(111) 111-1111

☐ 1. Life threatening (or potential) and requires ongoing medical treatment. When necessary, appropriate arrangements for evacuation to an acute care facility will be made.

Deleted Tasks/Documents - Axxess is a cloud-based software so most deleted data will remain in the system. Deleted tasks will be found in this section.

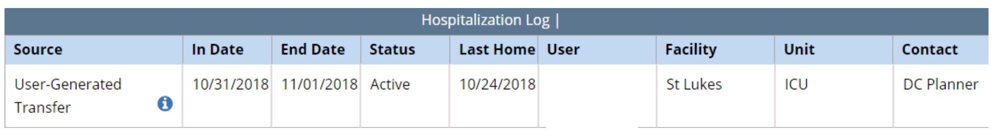


Client Deleted Tasks/Documents History |

Filter by Text: Start Typing | Refresh

Task/Document	Scheduled Time	Actual Time	Status	User	Action
OASIS C2 Transfer	01/01/2019	01/01/2019	Not Yet Due		Restore

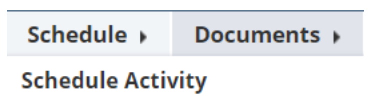
Hospitalization Log - Displays a list of the client hospitalizations. Information provided includes: the name of the Facility and Unit, Contact, Admit Date and End Date, who recorded the hospitalization, Last Home Visit, Source, and Current Client Status.



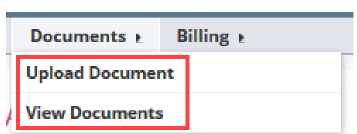
Hospitalization Log |

Source	In Date	End Date	Status	Last Home	User	Facility	Unit	Contact
User-Generated Transfer	10/31/2018	11/01/2018	Active	10/24/2018		St Lukes	ICU	DC Planner

Schedule - The Schedule Menu has a Schedule Activity option which generates the client's Schedule Center window.



Documents - The Documents Menu has two options available to select:



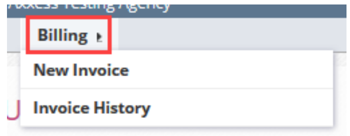
Upload Document: Upload Document provides the ability to attach a document to the client chart. It contains three required completion fields: Document Name, Upload Type and a document attachment field.

NOTE: There is a 5MB document size limit. Documents greater than 5MB will need to be separated prior to uploading.

View Document: Provides the ability to view existing client documents.

Billing - The Billing tab has two options available to select:

- Provides ability to create New Invoice from within the Client Chart.
- Invoice History navigates to the client's invoice history page.



Client Center Client Profile

The main section of the client charts window will contain a brief synopsis of the client's details:

- The client's picture can be uploaded by the agency as a form of visual reference.
  - A "Change Photo" button is available for the uploading process.
- The client's name will be indicated next to the picture. It will be viewed as Last name, First name.
  - Selecting the arrow next to the client's name will open the Schedule Center.
  - If the client has a Do Not Resuscitate request, an indicator DNR will be visible next to the name.
- The agency assigned Medical Record Number (MRN#) will be visible after the client's gender and age. **Female, Age 69 – MRN: 15875**
- The Physician, Date of Birth, Start of Care Date, Primary Phone number and indicator of Medical/Non-Medical status will also be visible in the middle of the Client Center so that they may be referenced easily.

Physician: Ardeshna, Usha

DOB	03/03/1949	**Phone**	(699) 999-9999
SOC	11/12/2018	**Phone Type**	Mobile
		Medical	Yes

Below the client's details are helpful hyperlinks:

[Edit] [More] [Directions] [Admissions]

Edit - This hyperlink will open the client's chart which contains the referral and admission details (permissions based).
More - This hyperlink will produce additional client details at a glance.

MRN
Name
Gender
Address Line 1
Address Line 2
City
State, Zip
Primary Phone
Mobile Phone
Start of Care Date
Date of Birth
Physician Name
Physician Phone
Physician Fax
Emergency Name
Emergency Phone
DNR

Directions – Provides turn by turn directions to the client home as well as satellite view directions. Starting address defaults as the Agency address; but may be altered as desired.

Admissions - If the client was discharged and readmitted, the admission periods will be listed in this window.

Client Admission Periods | TEST, TESTY

Filter by Text Start Typing Refresh Add New Period

Admission Date	Discharge Date	Current Admission Period	Associated Care Period(s)	Action
11/12/2018		Yes	Yes	

Selecting the "+" icon beside the Admission Date will generate more details pertaining to that admission period.

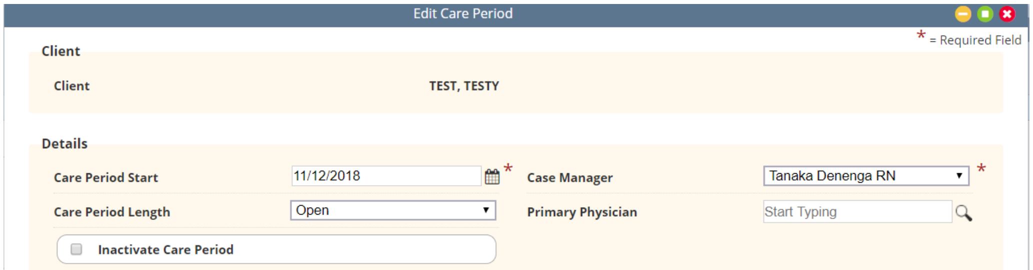
Admission Date	Discharge Date	Current Admission Period	Associated Care Period(s)	Action
11/12/2018		Yes	Yes	

Care Period Start Date	Care Period End Date	Action
11/12/2018		Edit Care Period

In the Actions column, the ability to "Edit Care Period" will be visible for users with the corresponding permissions.

Action
Edit Care Period

Select “Edit Episode” to generate a window with details for managing the episode.



For more details, please reference Managing Episodes in the Schedule Center section within this document.

Blue Action Buttons

The three action buttons in the middle section of Client Center include the following abilities:

- Refresh - Refreshes the screen after making changes.
- Schedule Activity - Navigates the user to the Client Schedule for Scheduling and Viewing Tasks. Alternate links to the Schedule Center from within the client’s chart: Client Name and Schedule-Schedule Activity.
- Change Status - Provides the ability to change the status of the Client.

Client Center Quick Reports

The list of items under the Quick Reports is also accessible from the View Tab. Reference **View Tab** section for an elaboration of the reports’ content.

Client Center Tasks

The lower section of the client chart contains a list of scheduled and completed documents for the client.

The list of documents may be grouped or filtered by task type or date range.

Group By: None ▾ Show: All ▾ Date: This Care Period ▾

- Group By - None, Status, Task, Assigned To or Status.
- Show - All, Orders, Nursing, PT, OT, ST, MSW, HHA or Dietician.
- Date - All, Date Range, This Care Period, Last Care Period, Next Care Period, etc.

Additionally, the bottom section includes the following columns:

Task	Date	Time In - Out	Assigned To	Status
AV HHA CP	06/12/2018	N/A	Shwetha Lathi RN	Completed
SN Visit	06/12/2018	12:15 AM-01:15 AM	Abby Kassebaum RN	Not Yet Started

Task - Displays the document name. The document name acts as a link to open and complete any task not in a completed status.

Date, Time In-Out, and Assigned To - The date and time are set to the scheduled date and time until the note is completed. It then displays the actual date and time of the task. The employee scheduled for the task will be displayed next.

Task Status - Displays the current status of the task. Examples include: Not Yet Due, Not Yet Started, Submitted with Signature, Submitted Pending Co-Signature, Completed, Returned from QA, Sent to Physician, Returned w/Physician Signature.

Electronic Visit Verification - A house icon provides notification that EVV has occurred for the task.

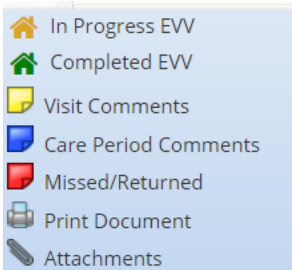
Status	
Not Yet Started	
Not Yet Started	

A yellow house indicates the employee has Clocked In, and a Green House indicates the employee has Clocked Out and Obtained Client Signature. Selecting the house provides EVV details.

EVV Details

Client Address	16000 North Dallas Parkway IRVINE TX 75248	
Client Address		Clinician Signature
EVV Start Location		
EVV End Location		

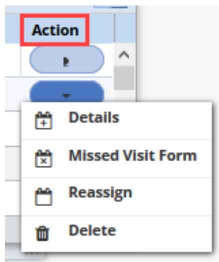
Sticky Notes: Yellow Sticky Notes provides notes for a particular task, Blue Sticky Notes provide notes related to the whole care period and Red Sticky Notes provide notes that are returned for Review.



Printer Icon - Selection of the printer icon displays the print view of the document. From here, the document may be downloaded or printed.

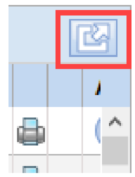
Attachments Icon - Displays documents attached to the notes. Attachments are added from within the details tab and may include wound pictures.

Action Column - Contains various action items based on the note status as well as the user's permissions.



- Details - Provides information related to the task. Certain fields are available for editing based on the note status and may include: Document Name, Time in-out, Payer, Status, Employee, Surcharge/Mileage, Update Bill/Pay, Add Task (yellow) sticky note, add Supplies as well as the ability to upload up to 3 documents. Last is the ability to view the Activity Log for this Task.
- Reassign - Tasks in a Not Yet Due or Not Yet Started status may be reassigned to another user.
- Reopen - Provides the ability to reopen completed documents to make changes necessary to the note.
- Missed Visit - Scheduled or Saved tasks have the option to record the task as a missed visit.
- Delete - Provides the ability to delete the task, which will then move to the Deleted Tasks/Documents under the client's Quick Reports.

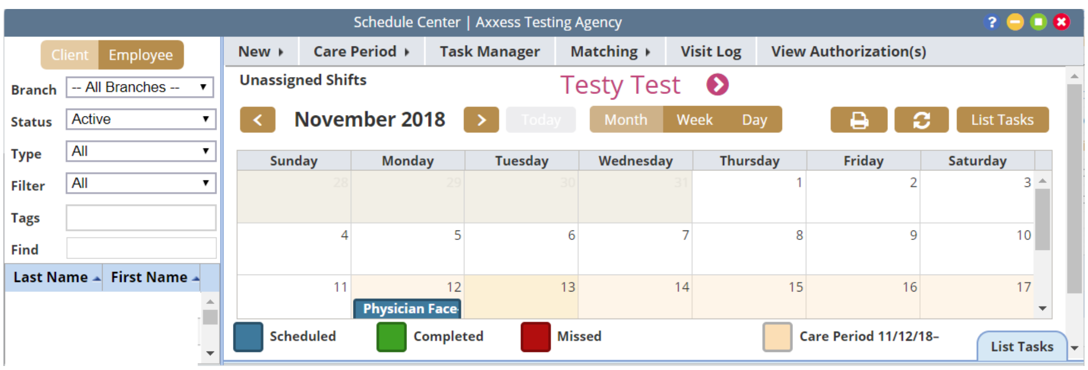
NOTE: The lower half of the client chart may be expanded to increase the field of vision for the task list.



An alternative route to review client tasks and schedule further visits is to select the “Schedule Activity” button, and it will generate the Schedule Center window.

Introduction To The Schedule Center

The Schedule Center is the view of the client’s tasks in a calendar format.

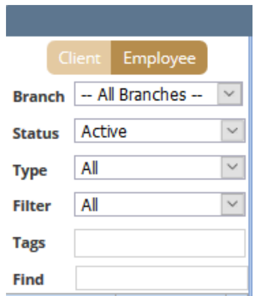


Schedule Center Filters

The left column provides the ability to view client and employee calendars/schedules. The default search is by client. Selecting Employee updates the criteria and results to employee.

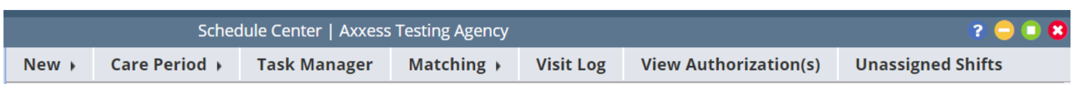
- Branch - Default is all branches. User's that have multiple branch access under the same agency may limit the client/employee search by selecting an individual branch location.
- Status - The Client or Employee's current status level.
    - Client: The default status is active but may be filtered to view Discharged, Pending, Hospitalized, Non-Admit.
    - Employee: Active, Inactive, Terminated.
- Type - Distinguishes the type of employee or client.
    - Client: Medical, Non-Medical or All (default).
    - Employee: System, Non-System or All (default).

- Filter - Client only search item. **Drop-down** list of payment sources.
- Tags - Allows filtering by tags the agency is using in the system (client/employee).
- Find - Provides the ability to input part of the client/employee first or last name and filter the list.

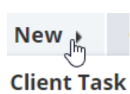


Schedule Center Top Menu

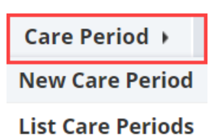
The Schedule Center has a list of menus that will assist with preparing and managing the client's schedule.



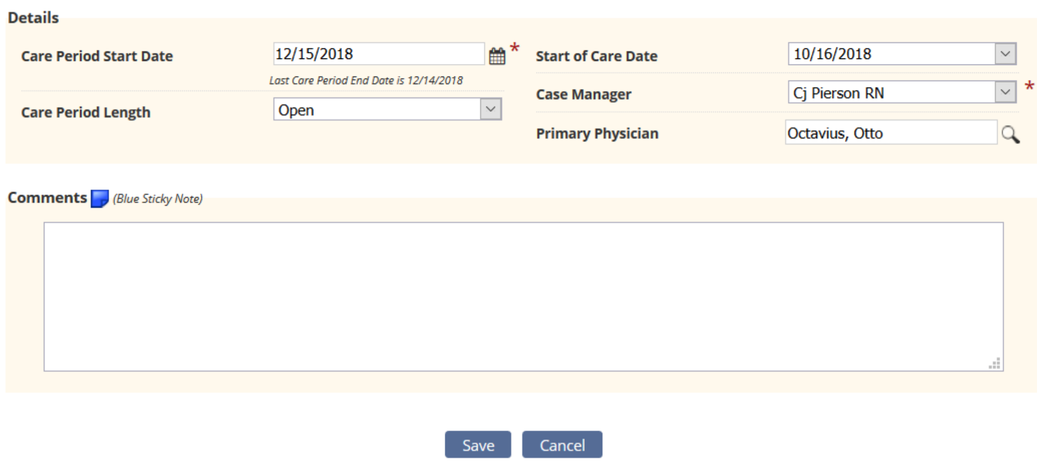
New – This menu option has one item available to select, "Client Task." This option is one of the two ways to schedule a task for the client.



Care Period – An active care period covering the time-span being scheduled is a prerequisite to successfully scheduling any task. To add a new care period the user selects *Care Period/New.*

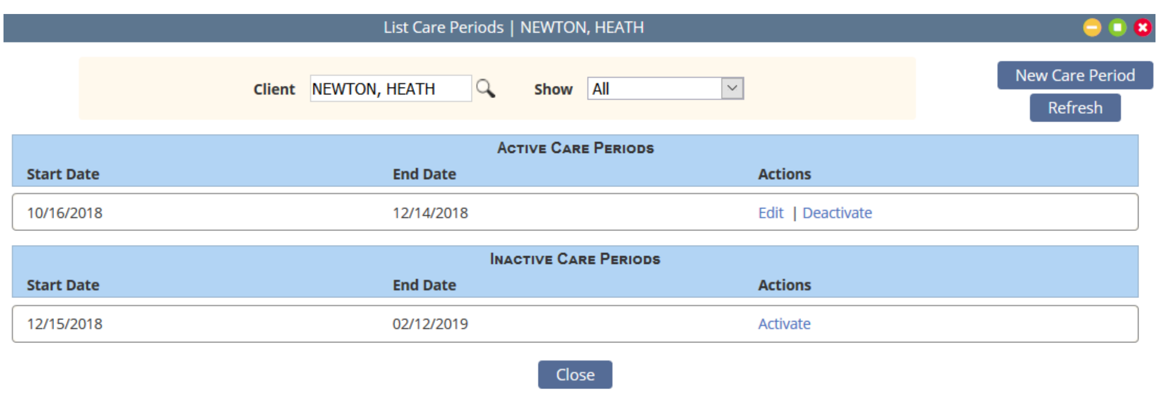


New Care Period: The following information will be available to complete:



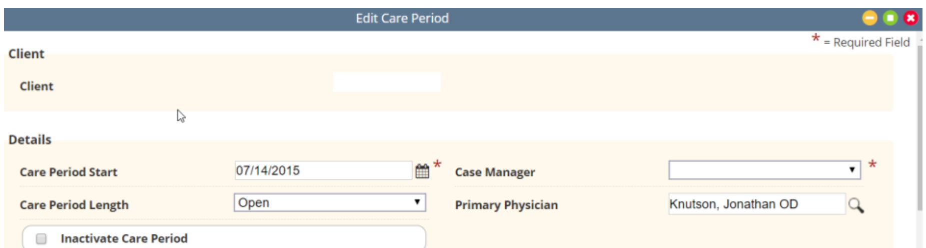
- Care Period Start Date - Date the Care Period Starts.
- Care Period Length - Several specified lengths exist to choose from along with an option for an open length (clients that do not require orders) and a specified length where the user inputs the length of days.
- Start of Care - Pulls from the client file.
- Case Manager - Indicates who will be Case Manager.
- Primary Physician - Pulls from the client file.
- Comments - Comments entered here pull to the blue sticky notes which are viewable from the task list.

List Care Periods: All active and any inactive care periods for the client will be displayed.

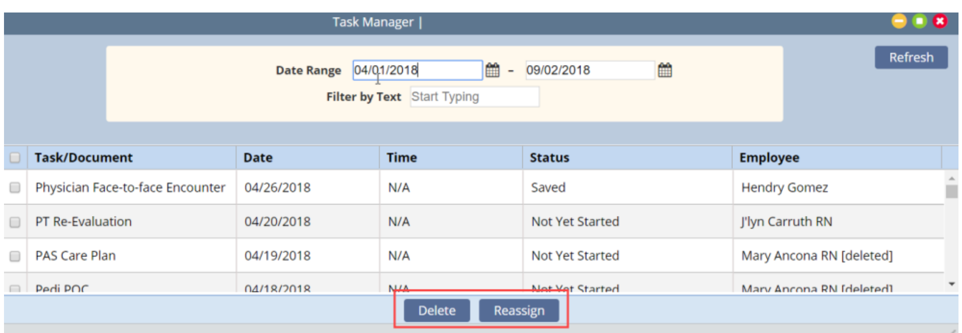


- For convenience, the option to add a New Care Period is also available in the List Care Periods window.
- The “Show” filter option provides the option to view Active Only, Inactive Only, or All types of care periods.
- Viewing Inactive Only episodes will have one action option: the ability to “Activate” the inactive care period.
- Viewing Active care periods will have two options: to Edit or Inactivate care period.

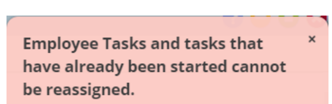
The “Edit” option will generate a window with the current Care Period details, with an opportunity to make modifications.



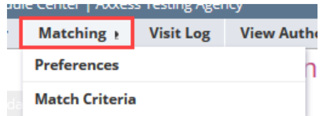
Task Manager - The Task Manager allows the ability to reassign or delete multiple tasks at the same time.



Tasks that have been Started or Completed cannot be reassigned.

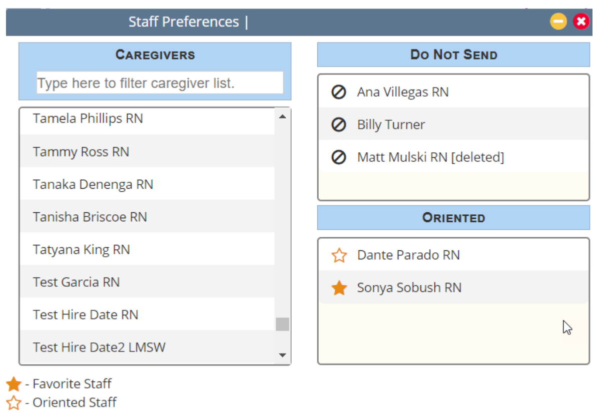


Matching – This tab has two submenus: Preferences and Match Criteria.

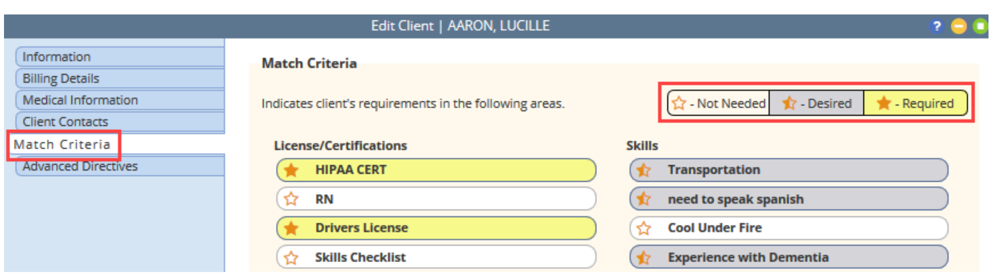


Preferences - Provides the ability to mark a caregiver as Oriented, a Client Favorite or as a Do Not Send.

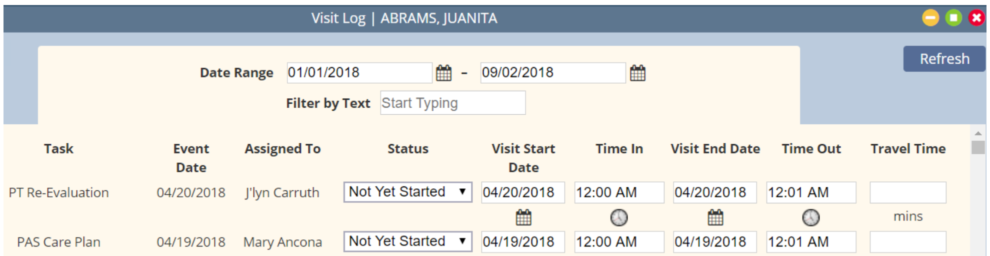
- To complete this, drag and drop the caregiver to the appropriate category. To indicate a caregiver as a favorite, select the name once they are in the oriented category.
- Oriented and Favorite staff are displayed at the top of the employee list when scheduling whereas the Do Not Send staff display as view only at the end of the list.



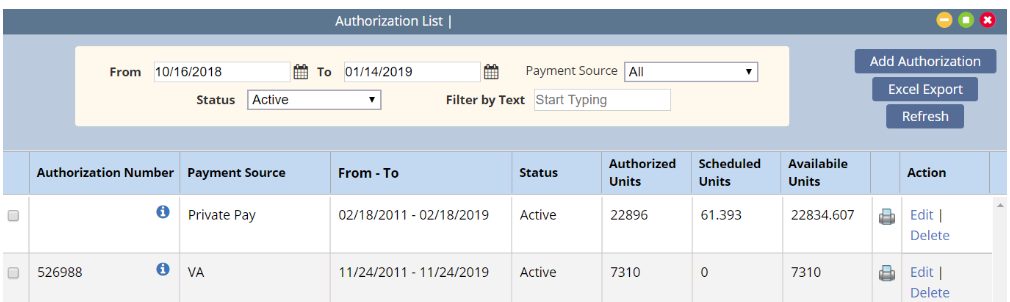
Match Criteria - Takes the user to the client's match criteria in their client file. From here the client's criteria may be viewed or updated. The Matching list is created by the agency and is taken into consideration when using the matching functionality during the scheduling process.



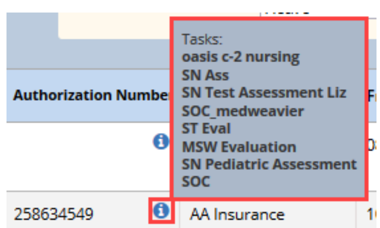
Visit Log – This option provides the ability to update specific information for billable tasks. This is particularly useful for updating non-system user information. Task status start and end dates, time in/out as well as travel time logging may all be updated from this menu.



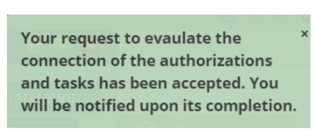
View Authorization(s) – This menu offers a quick link to the client's authorization screen where they may view/edit or add a new authorization.



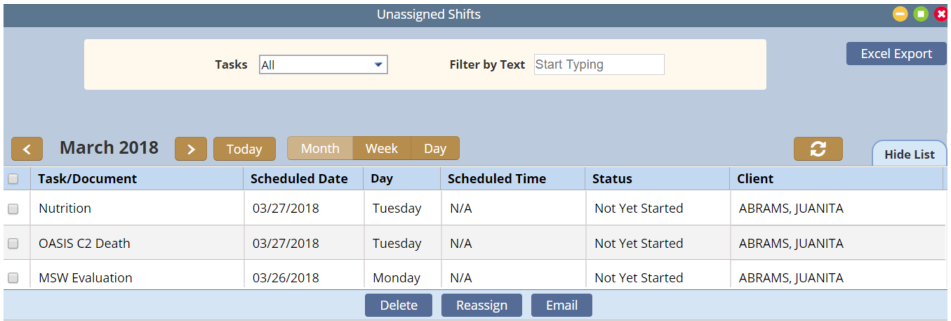
Hovering over the ℹ will indicate the Tasks assigned to the authorization.



The ability to evaluate the authorization is available at the bottom of the window by selecting the “Evaluate Authorizations” button.

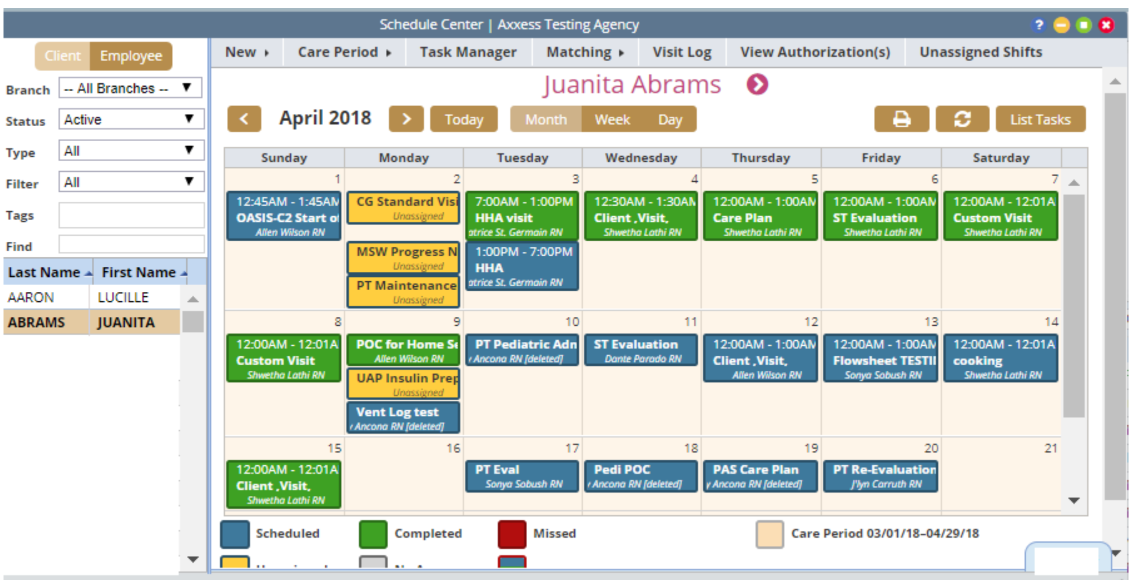


Unassigned Shifts - The Unassigned Shifts menu displays all scheduled tasks that have not been assigned to a caregiver. The default page display is for the unassigned (open) tasks for the current month in list view. Users may select to view individual tasks, adjust the date range (month/week/day) or view in calendar format (select Hide List). To assign a caregiver select the day(s) they are confirming, select Reassign and choose the caregiver who is accepting the shift(s).

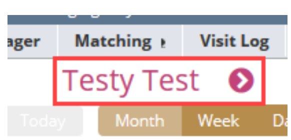


Client's Calendar View

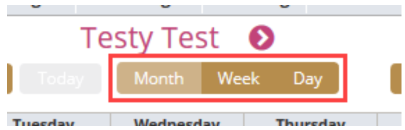
Once a client is selected, the calendar will display:



If the List Task view is displayed, selecting “Hide List” will revert to the Calendar View. Selecting the Client's Name is a quick link to the Client's Chart.



User's may view the Client Schedule in Month, Week or Day formats by selecting the corresponding action. The default view is by month.

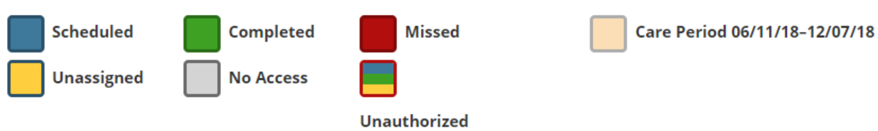


Depending on the view selected the arrows will move to the prior or next Day/Week/Month.

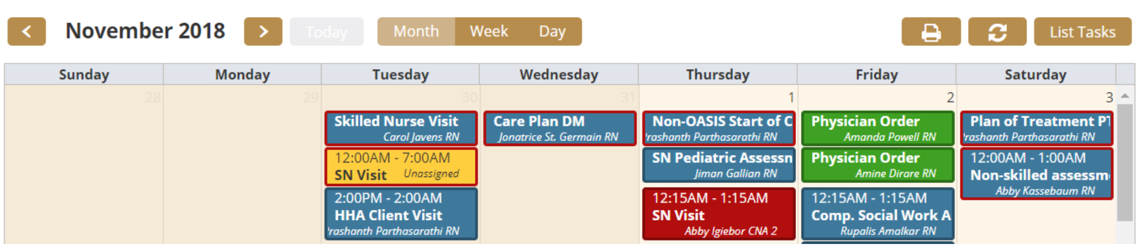
The Printer Icon will print the schedule (permission based). The Rotating Circle Icon is a page refresh.

Selecting "List Tasks" displays the client schedule in list format. See **List Task** section below.

The color legend is located below the calendar for easy reference:



- **Blue** = Scheduled task.
- **Green** = Completed task.
- **Red** = Missed visit.
- **Peach** = Care Period.
- **Yellow** = Unassigned task.
- **Grey** = No Access to task.
- **Red Border** = Outlined in a red border is unauthorized.



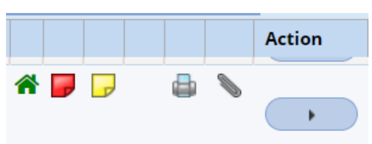
List Task View

Selecting “List Tasks” displays the client schedule in list format. The List Task button is also available at the bottom right-hand side of the page.

Above the List Tasks view, a Menu Bar displays with the following:

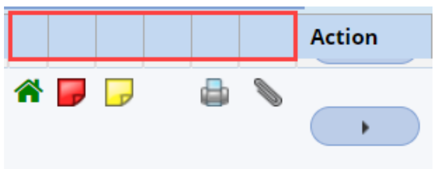
A	Task	Payment Source	Start Time	End Time	Employee	Status
	Physician Face-to-face Encounter		11/12/2018	11/12/2018	Tanaka Denenga RN	Not Yet Started

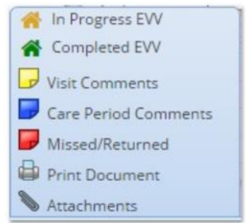
- Red A - Indicates tasks that do not have an associated required authorization. The task will also have a red border in the calendar view.
- Task - The name associated to the service being performed.
- Payment Source - The identified payer of the task.
- Start Time - Scheduled Date and Start Time of the task/shift.
- End Time - Scheduled Date and End Time of the task/shift.
- Employee - The caregiver scheduled to perform the task.
- Status - The status of the task/shift.
- Untitled Columns **-** The columns without titles will display the following icons:



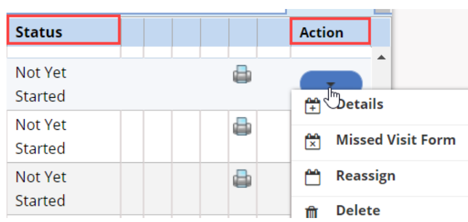
- EVV - Permission-based electronic visit verification details.
  - A Yellow house represents EVV that is in progress.
  - A Green house is a completed visit.
- Visit Comments - Notes associated to that task. Notes are added from the Action Column’s Details option.
- Care Period Comments - Notes associated to the Care Period. These comments are entered at the care period level (Care Period-New or List Care Periods-Edit).
- Missed/Returned Comments - Comments related to the reason the task was missed or returned.
- Print Preview - Select this to view the document.

- Attachments - Presents when attachments are associated to the task. Selecting will present the attachment.

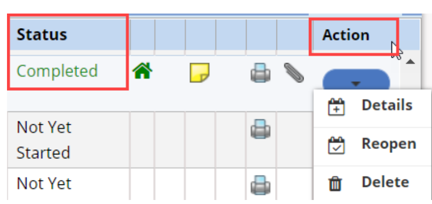




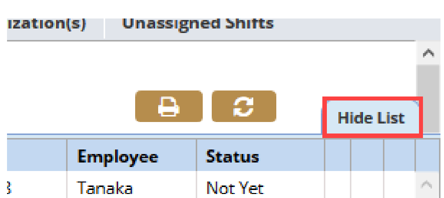
- Action Column - The options in this column are permission based and contingent on the status of the task. Tasks that have not yet been completed may have the following options associated:



- Details - Opens the detail page of the task allowing viewing/editing of the scheduled date/time; payment source, caregiver, Mileage/Travel/surcharge information as well as the ability to enter comments (yellow sticky) and attachments.
- Missed Visit Form - Allows the documentation of a missed visit/shift.
- Reassign - Ability to quickly reassign a task to another user.
- Delete - Removes the task.

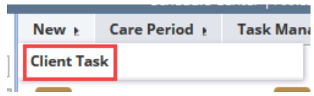


The Completed tasks on the other hand have fewer actions available. Details and Delete are the same actions while Reopen will reopen the task. To hide the List Task view, select the “Hide List” view.

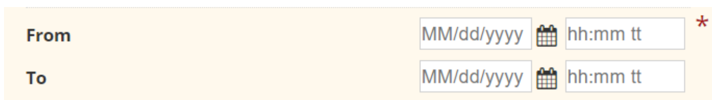


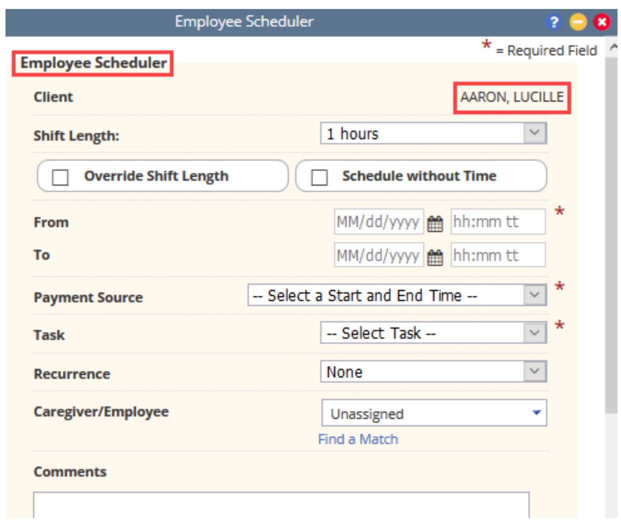
Scheduling Visits to a Client

There are two ways to schedule a task: One way is by selecting the calendar day or by selecting *New/Client Task.*



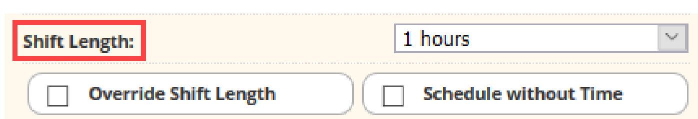
Both paths open the “Employee Scheduler” window. Selecting the calendar day will pre-populate the date in the new task schedule window. The date will be entered manually when using the New Task route.





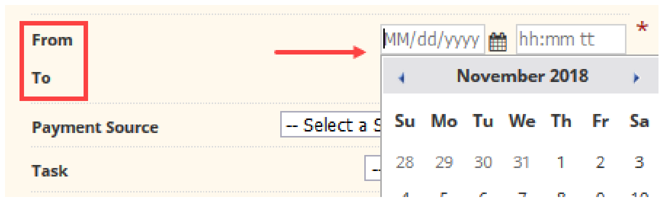
The following are further details for the Employee Scheduler, each piece and what it allows the agency for scheduling purposes:

1. Shift Length - Includes three options: a drop-down selection which automatically calculates the 'to' time once the shift start time is entered; Override the Shift Length allows manual input of the shift in and out times.

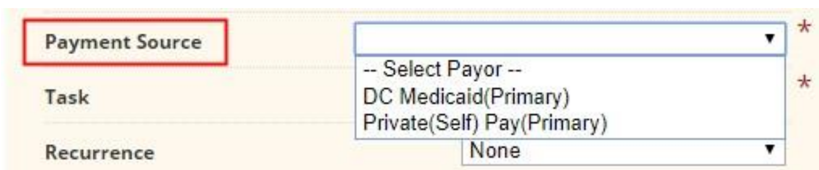


2. From and To - Agencies will place the date of Service in the From and To areas. If the agency Selects a Shift length hour from the drop-down selection once they place the start time, it will automatically calculate the end time. If Override

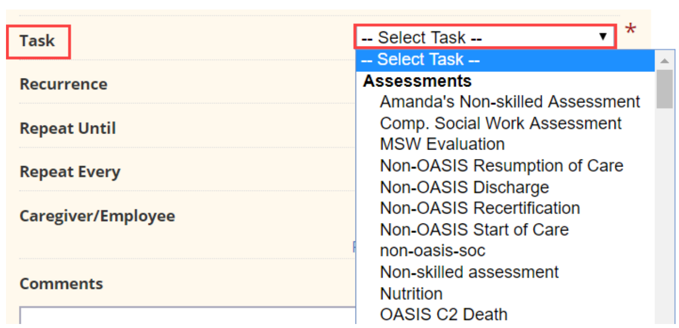
Shift Length is selected, then the agency will set their own start and end time. If the agency selects to Schedule without time, then the start and end time will disappear.



3. Payment Source **-** Once the From and To fields are populated the payment source list will display all client payers that cover the date being scheduled. Select the Payment Source paying for the scheduled task.

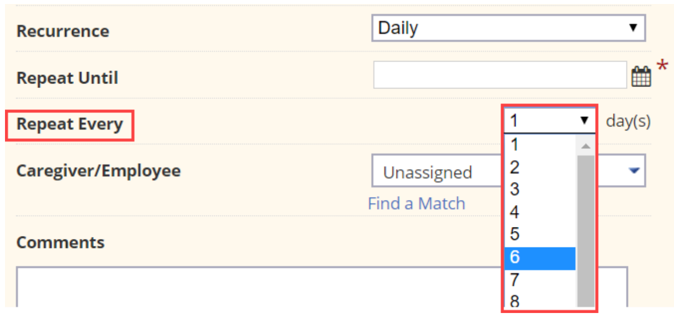


4. Task **-** Select the task being scheduled. The task list is ordered by category and may contain the following based on the types of documents the agency has created: Assessments, Visit Notes, Care Plans, Orders, Coordination of Care and Supervisory.

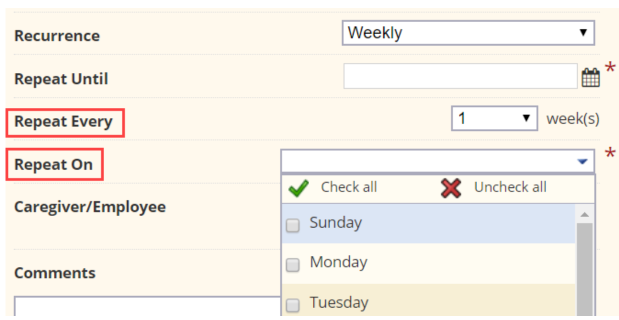


5. Recurrence **-** The recurrence feature allows the agency the ability to easily schedule the same task out multiple times based on the client's specified need. If a recurrence schedule is used, the user must indicate an "end date" of the recurrence and for the daily/weekly options of how often the task repeats.

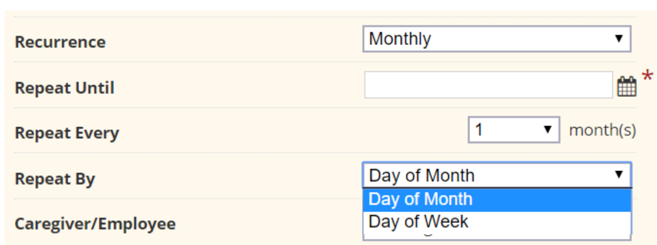
Recurrence Options:
None - No recurrence needed.
Daily - Task recurs every 'X' amount of days until the end date is reached.



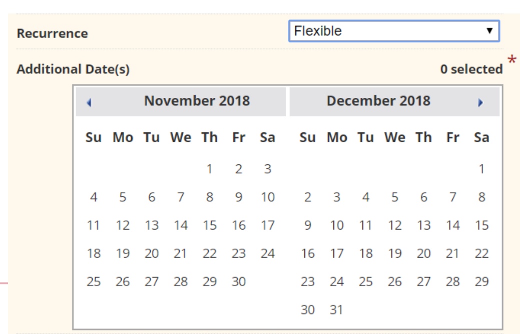
Weekly - Task repeats every 'X' number of weeks on the days selected.



Monthly - Task repeats every 'X' number of months on the selected day of the month or the day of the week.



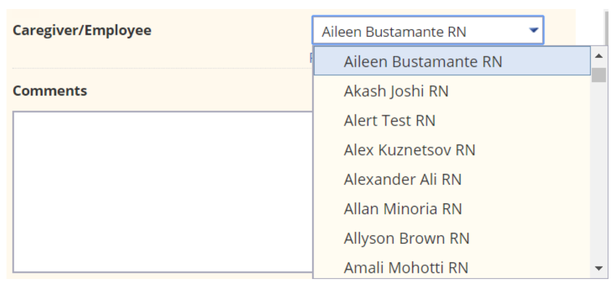
Flexible - Useful for tasks that do not recur in a set pattern. Select the days the task needs to occur on. There is a current limit of 31 scheduling events that may be scheduled at a time.



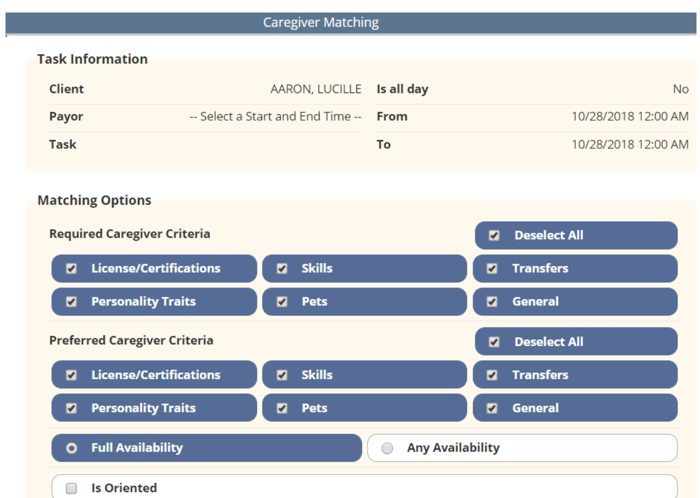
6. Caregiver/Employee **-** Indicate who will be completing the task. Three selections are available:

Unassigned **-** If there isn't an identified caregiver for the shift the task may be set up as unassigned (open). Unassigned tasks appear Yellow on the client schedule for easy identification. Once a caregiver is identified the task may be reassigned to the user.

Assign to Caregiver/Employee **-** If a staff member has been identified the drop-down user list may be used to select the staff. The staff that has been identified as oriented and favorite will show at the top of the list for easy selection. The list will also filter as a user's name is typed (when the drop-down list is open).



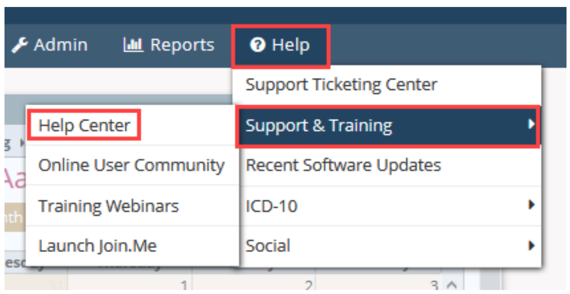
Find a Match **-** The last option is to search for suitable matches based upon the match criteria set up for the clients and employees.



7. Comments & Save - The last step in Scheduling is to add any comments about the tasks to be scheduled. These show up as a yellow sticky note on each task scheduled. Once all the information is entered completed, the agency can "Save & Close" which will add the task/s to the client schedule. If the agency chooses they can "Save & Add Another" task for the client.

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 *Help/Support & Training/Help Center.*



Or also available at https://www.axxess.com/help/