HOSPICE
ADMINISTRATOR OVERVIEW
TRAINING MANUAL

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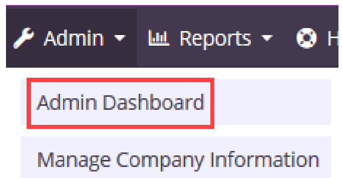
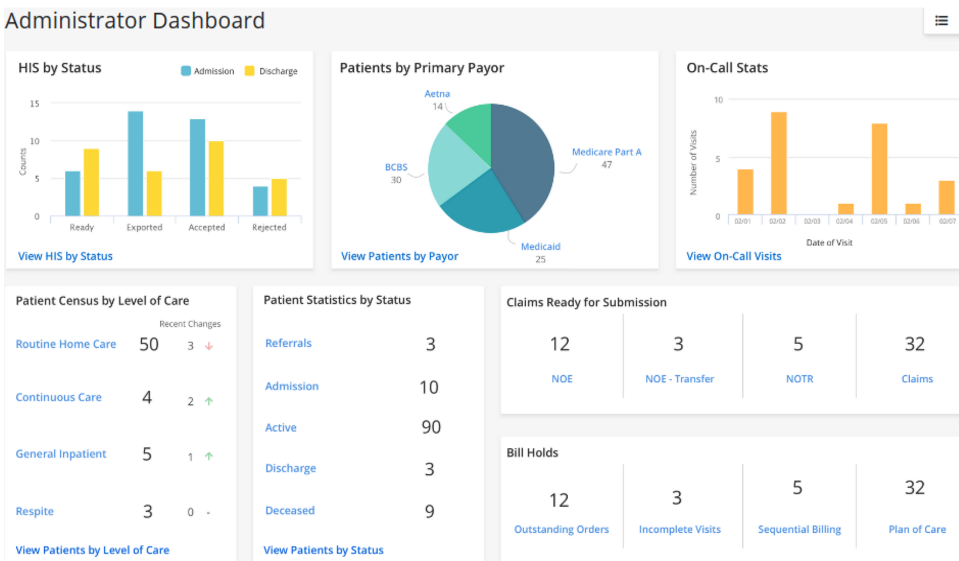
ADMIN DASHBOARD

Admin/Admin Dashboard



The Administrator Dashboard is seven different tiles:



<u>HIS by Status</u> – Bar graph view of HIS differentiated by the number of Admissions and Discharge in Ready, Exported, Accepted and Rejected status.

<u>Patients by Primary Payer</u> – Pie graph view of how payers are split up between patients.

<u>On-Call Status</u> – Bar graph view of the number of visits that were made per day for the last seven days.

<u>Patient Census by Level of Care</u> – Shows the number of patients by Routine, Continuous, General Inpatient and Respite and the recent changes of each level.

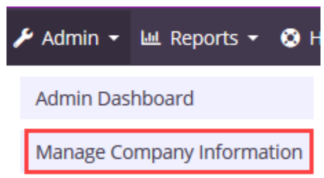
<u>Patient Statistics by Status</u> – Shows the number of patients by Referrals, Admission, Active, Discharge and Deceased.

<u>Claims Ready for Submission</u> – Shows the number of claims by NOE, NOE-Transfer, NOTR and Claims that are ready for submission.

<u>Bill Holds</u> – Shows the number of bills being held by Outstanding Orders, Incomplete Visits, Sequential Billing and Plan of Care.

MANAGE COMPANY INFORMATION

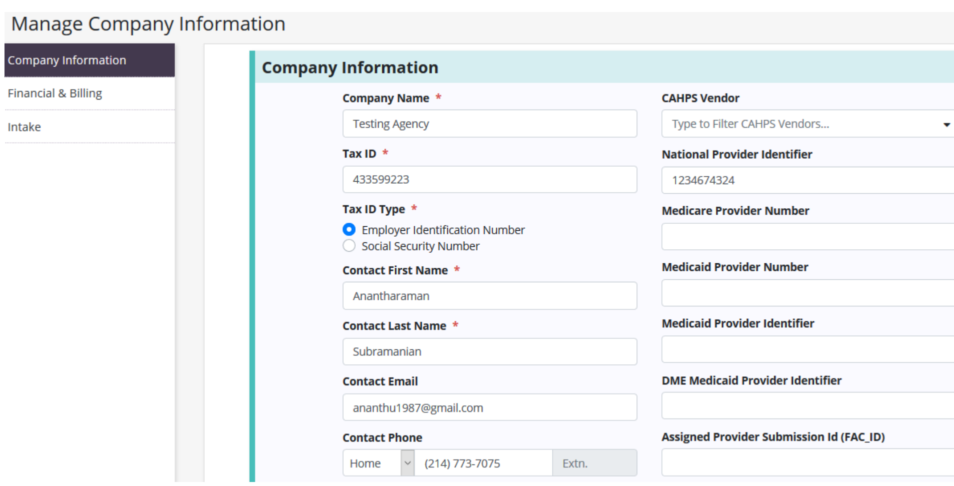
Admin/Manage Company Information



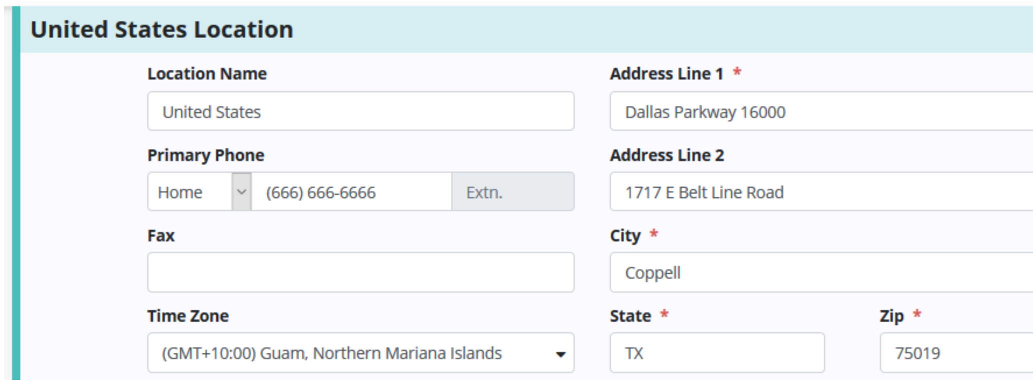
Manage Company Information is split up into three tabs found on the left side of the window:

1. **Company Information** – Where users enter the agency's information, ID's and Provider Numbers (retrieved outside of Axxess).

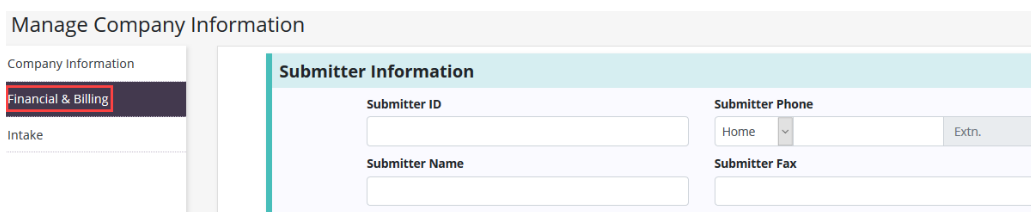
NOTE: Anything with a red asterisk (*) means the information is required to save.



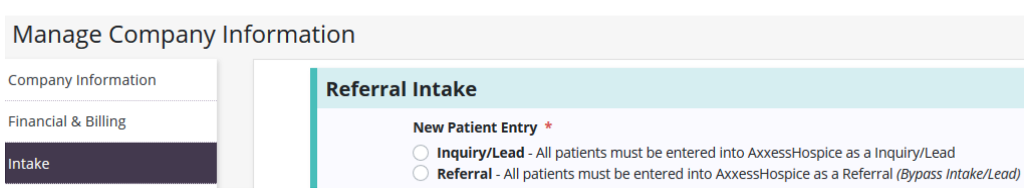
Agency Location – Enter the agency's Name, Phone & Fax number, Address and Time Zone.



2. **Financial & Billing** – Submitter information is entered here if the agency is not using Axxess for billing. Enter Submitter ID, Phone, Name and Fax.



3. **Intake** – The agency must decide when it comes to New Patient Entry whether all new patients being entered into Axxess Hospice are listed as an Inquiry/Lead or skip that step to be a Referral by selecting either bullet.



ADD AND LISTS

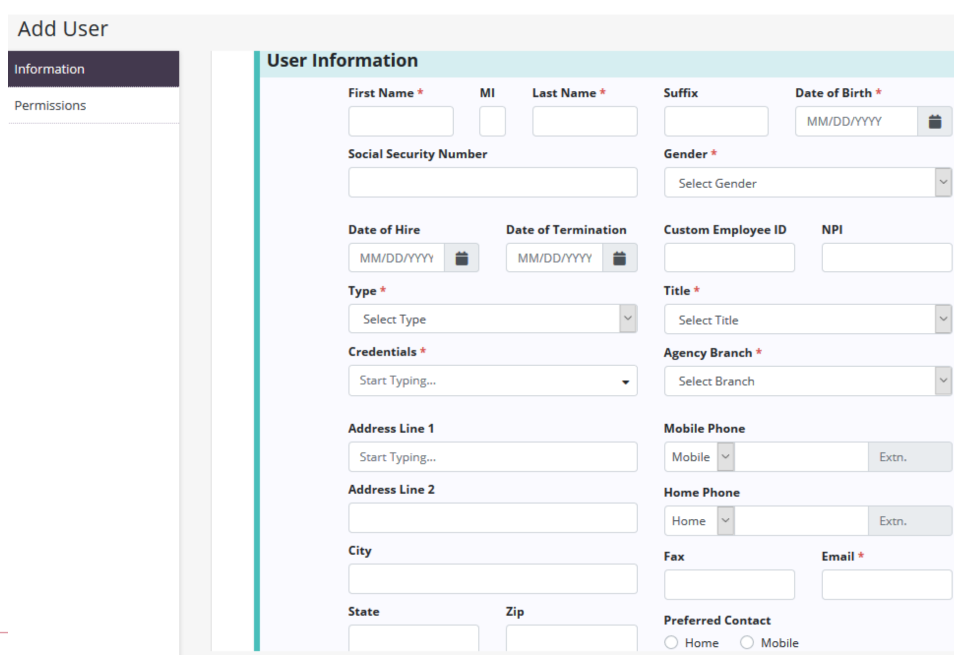
The top right-hand corner of Axxess Hospice houses the Lists and Add sections.

- Lists are found in the ☰ icon.
- Add list is found in the + icon.

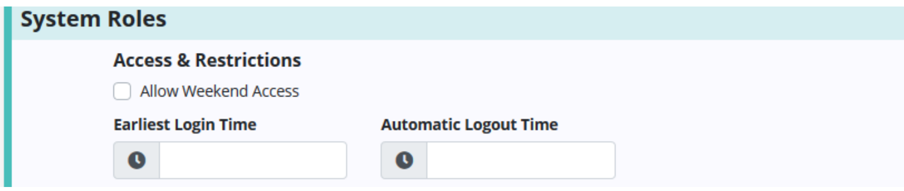
ADDING A NEW USER

Add/User

Information - A window will open and the user's information must be entered. All items with an asterisk are required.

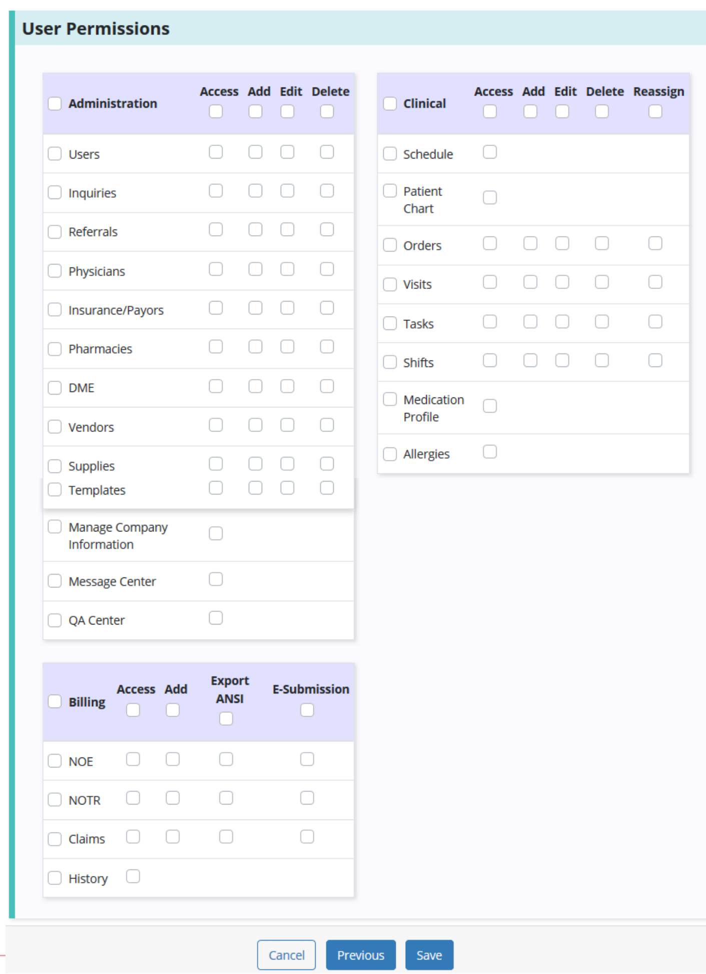


The bottom of the page houses System Roles. This is a restriction function that will allow agencies to limit the times that users can access the software. For example, if the “Allow Weekend Access” box is not checked and a user attempts to login on a Saturday, the system will not allow entry. Times can also be adjusted for the earliest time a user can log in and/or when they are automatically logged out of Axxess Hospice.



Select the “Save” button to leave the section but keep what has been entered so far. Select the “Next” button to move on to the next new user tab.

Permissions - Permissions are important in the software because they determine what a user can or cannot see, add, edit, delete or reassign.

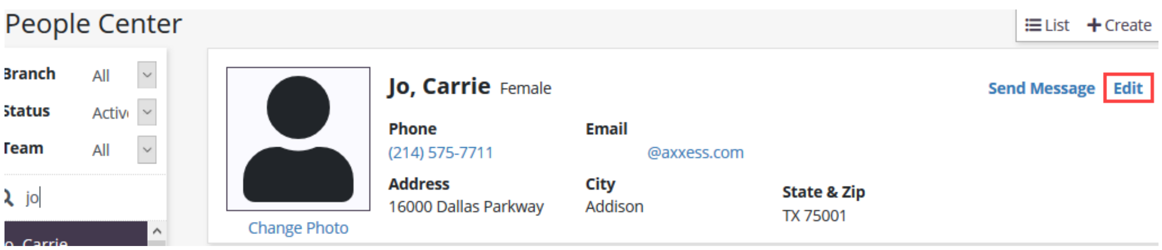


Permissions will allow agencies to manually select which Administration, Clinical or Billing permissions they wish their users to have.

To save time, there is also a Select All checkbox in the top left corner of each category that will check every single permission box in that section. Once finished, select the “Save” button to complete.

EDITING A USER

People/People Center/Edit

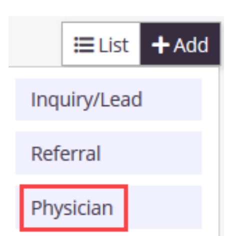


The People Center window will open which will default to show a list of all Active users. Use the Search feature in the top left to filter for specific employees or scroll down through the list. Selecting the name of the user will show detailed information of that user including their Photo (user can change), Name, Gender, Roles, Address, Phone Number and Email Address.

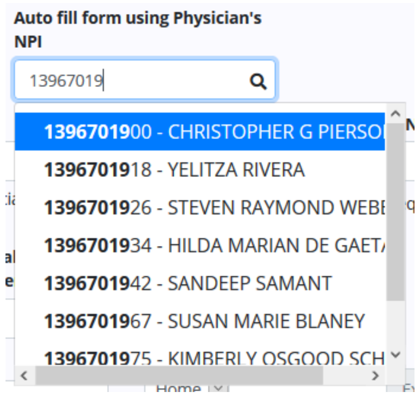
To edit a user, select the “Edit” hyperlink in the top right of the user profile. The same Information and Permissions tabs while adding new user will be available to edit. Other hyperlinks include “Refresh”, which updates the page, and “Send Message”, which is a quick link to send that user a message.

ADDING A PHYSICIAN

Add/Physician

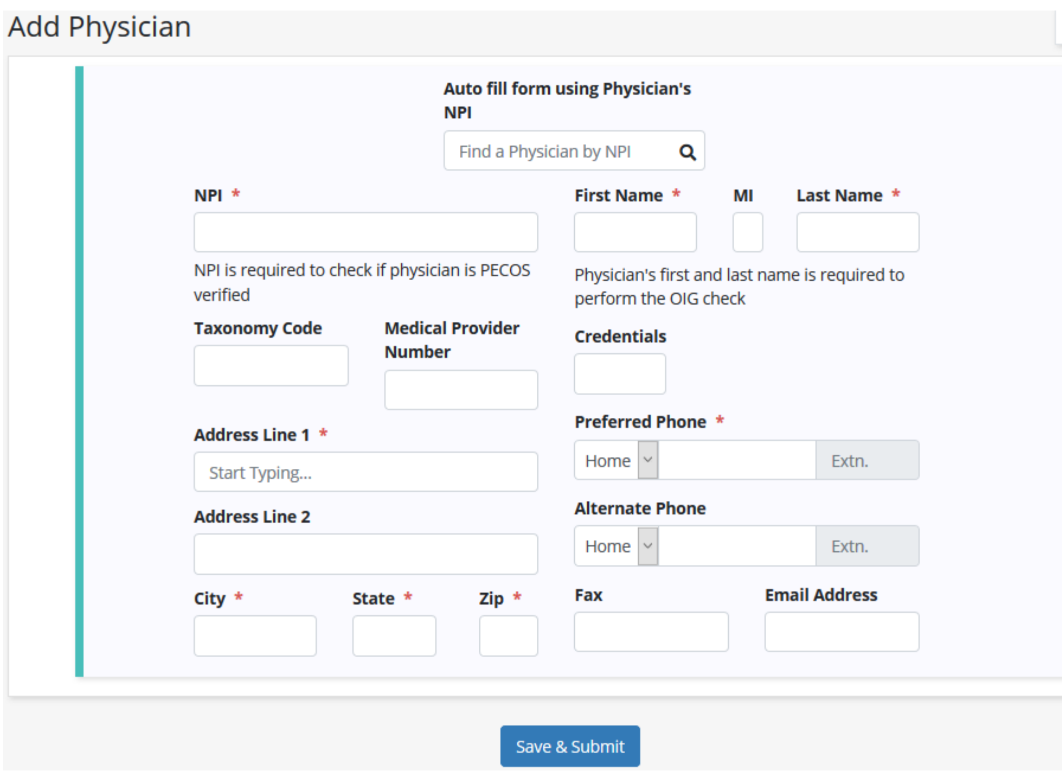


A new window will open. The quickest way to enter a physician is by entering their “NPI number.” As the number is typed, physicians and their corresponding NPI numbers will appear below for selection.

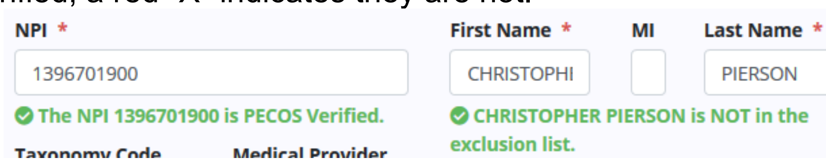


After selecting the physician and pressing the tab key, the Physician Information and Address will auto-fill based on the information that is in the NPI registry. This can still be edited. Everything with a red asterisk is required.

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 and OIG check. A green check mark indicates they are PECOS-verified, a red “X” indicates they are not.

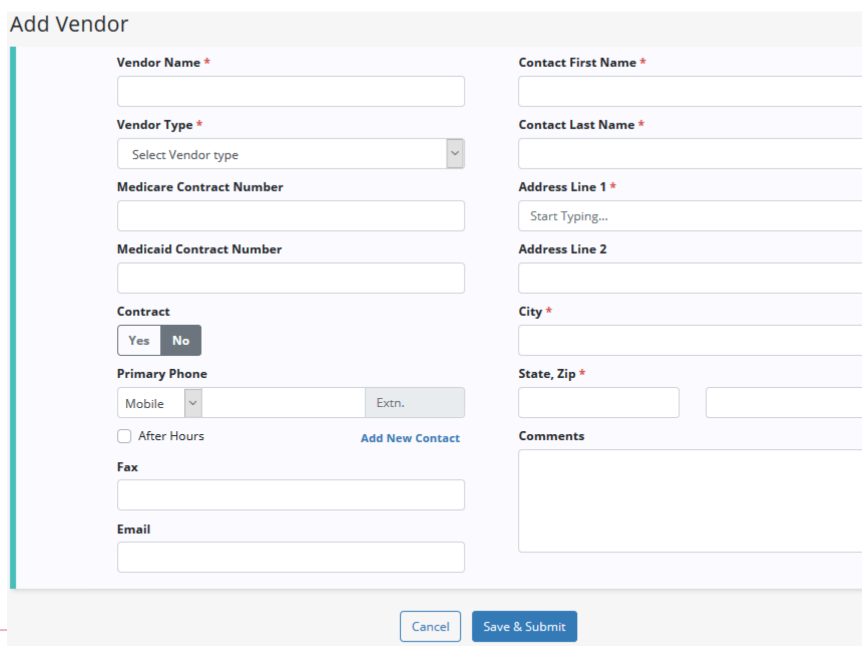


Once completed, select the “Save & Submit” button at the bottom.

ADDING A NEW VENDOR

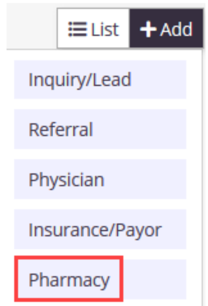
Add/Vendor

A new window will open. Enter the Vendor Name, Type, Contact First & Last Name, Address, and as much information as possible. When finished, select the “Save & Submit” button at the bottom.

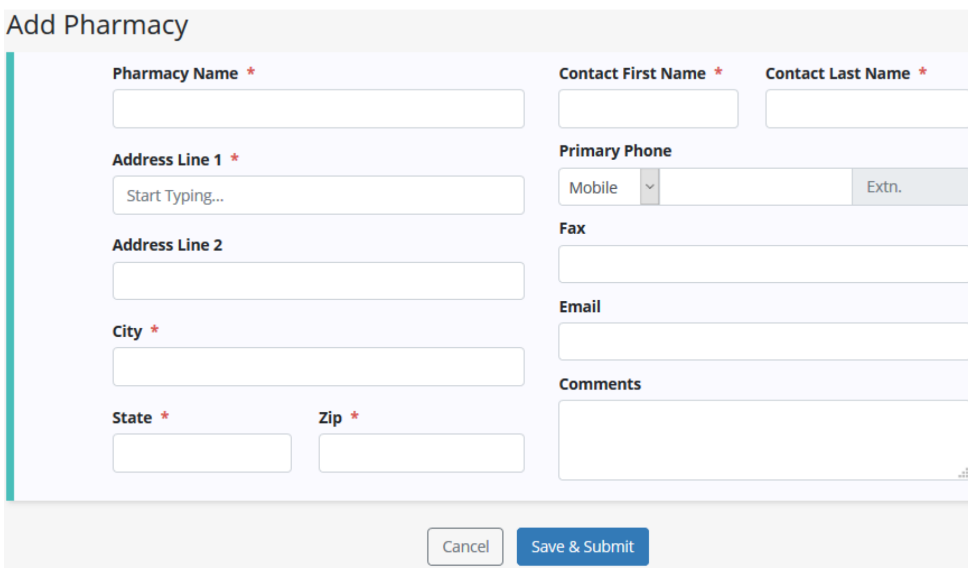


ADDING A NEW PHARMACY

Add/Pharmacy



A new window will open. Input the Pharmacy Name, Address, Contact First & Last Name, and all other information available. When finished, select the "Save & Submit" button at the bottom.



ORDERS MANAGEMENT

Patients/Orders Management

Use the search bar to find a specific order. Search by Patient, Physician, Type or Order Date range.

Orders are split into two sections:

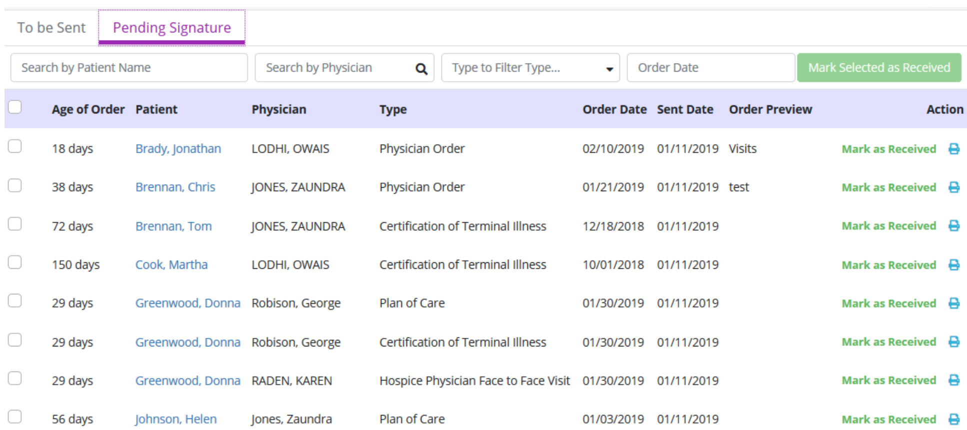
1. **To Be Sent** – This is the section where orders are housed that are ready to be sent for signature. Orders are displayed by Age of Order, Patient, Physician, Type, Order Date, Date Approved and Order Preview.

Age of Order	Patient	Physician	Type	Order Date	Date Approved	Order Preview	Action
13 days	Acosta, Sandra		Plan of Care	02/15/2019	01/11/2019		Mark as Sent
4 days	Dolan, Jacqueline	HANSBERRY, MARIA	Physician Order	02/24/2019	01/11/2019		Mark as Sent
8 days	Dolan, Jacqueline		Plan of Care	02/20/2019	01/11/2019		Mark as Sent
5 days	Dolan, Jacqueline	HANSBERRY, MARIA	Certification of Terminal Illness	02/23/2019	01/11/2019		Mark as Sent
144 days	Graves, Sallie	GRENDON, MICHAELTODD	Plan of Care	10/07/2018	01/11/2019		Mark as Sent
42 days	Hunt, Marc		Physician Order	01/17/2019	01/11/2019	Stop CC	Mark as Sent
48 days	Johnson, Helen	Jones, Zaundra	Plan of Care	01/11/2019	01/11/2019		Mark as Sent

Select the Patient hyperlink to go straight to the Patient Chart. Print orders individually by selecting the icon under the Action column.

Mark individual orders as sent by selecting the green “Mark as Sent” hyperlink under the actions column or select checkboxes to the left of orders then select the “Mark Selected as Sent” button at the top right.

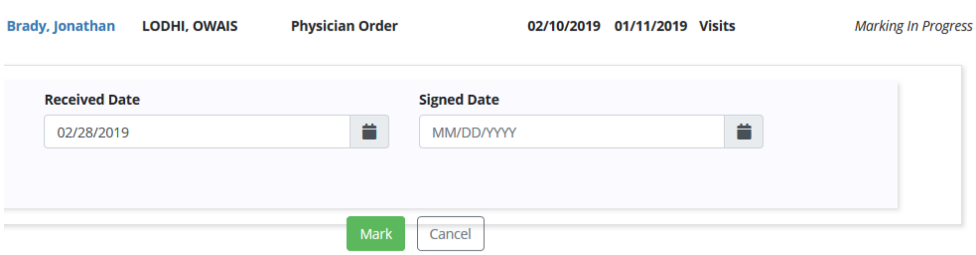
2. **Pending Signature** – This is the section where orders are housed that have been sent for signature and are expected back. Orders are displayed by Age of Order, Patient, Physician, Type, Order Date, Sent Date and Order Preview.



Age of Order	Patient	Physician	Type	Order Date	Sent Date	Order Preview	Action
18 days	Brady, Jonathan	LODHI, OWAIS	Physician Order	02/10/2019	01/11/2019	Visits	Mark as Received
38 days	Brennan, Chris	JONES, ZAUNDRA	Physician Order	01/21/2019	01/11/2019	test	Mark as Received
72 days	Brennan, Tom	JONES, ZAUNDRA	Certification of Terminal Illness	12/18/2018	01/11/2019		Mark as Received
150 days	Cook, Martha	LODHI, OWAIS	Certification of Terminal Illness	10/01/2018	01/11/2019		Mark as Received
29 days	Greenwood, Donna	Robison, George	Plan of Care	01/30/2019	01/11/2019		Mark as Received
29 days	Greenwood, Donna	Robison, George	Certification of Terminal Illness	01/30/2019	01/11/2019		Mark as Received
29 days	Greenwood, Donna	RADEN, KAREN	Hospice Physician Face to Face Visit	01/30/2019	01/11/2019		Mark as Received
56 days	Johnson, Helen	Jones, Zaundra	Plan of Care	01/03/2019	01/11/2019		Mark as Received

Select the Patient hyperlink to go straight to the Patient Chart. Print orders individually by selecting the icon under the Action column.

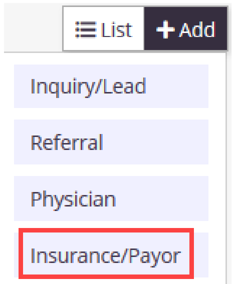
Mark individual orders as received by selecting the green “Mark as Received” hyperlink under the Actions column. The Received Date populates with the current date. Enter the Signed Date then select the “Mark” button.



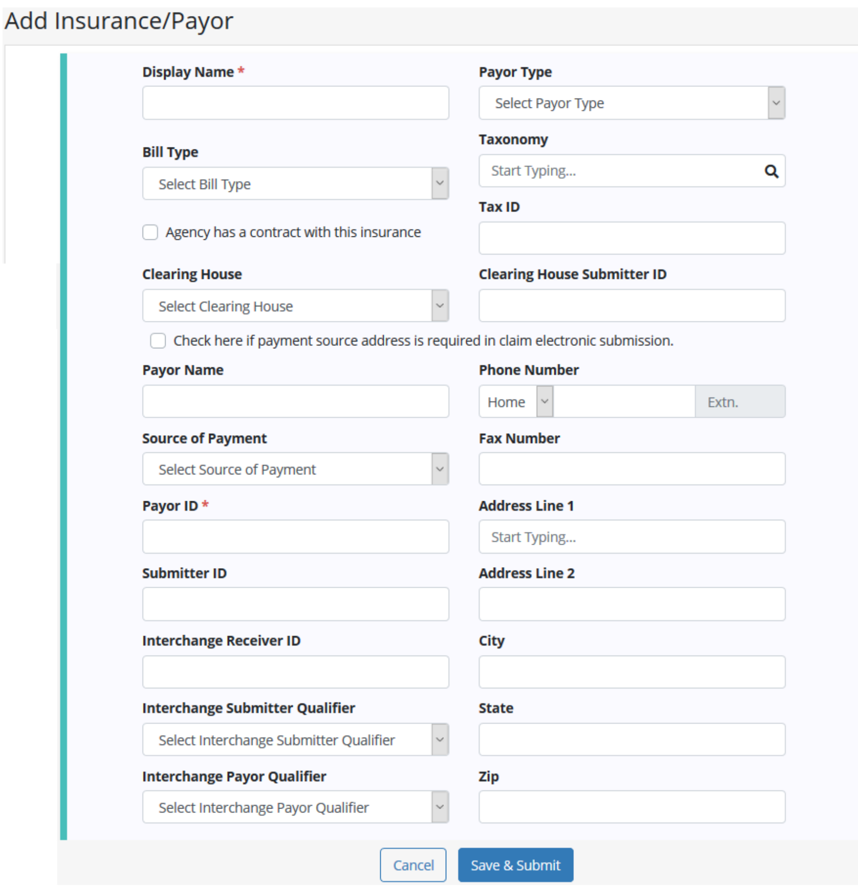
To mark multiple orders, select checkboxes to the left of orders then select the “Mark Selected as Received” button at the top right.

ADDING AN INSURANCE/PAYER

Add/Insurance_Payer

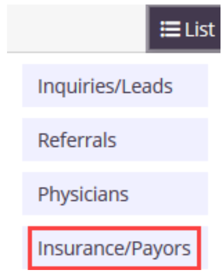


A new window will appear. Enter the Display Name, Payer ID and other fields below. When finished, select the "Save & Submit" button at the bottom.



EDITING EXISTING INSURANCE/PAYERS

List/Insurance_Payers



Select the "Edit" hyperlink to the far right of the screen under the Action column. This is also where the "Delete" function is found. To search for a payer, Start Typing any part of the Payer Name, Display Name, Bill Type, Payer Type, Phone or Fax in the white free text space at the top left of the page.

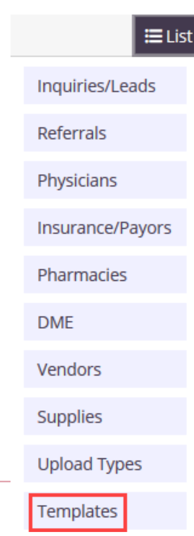
Insurance/Payor

Search for Payors by Name...

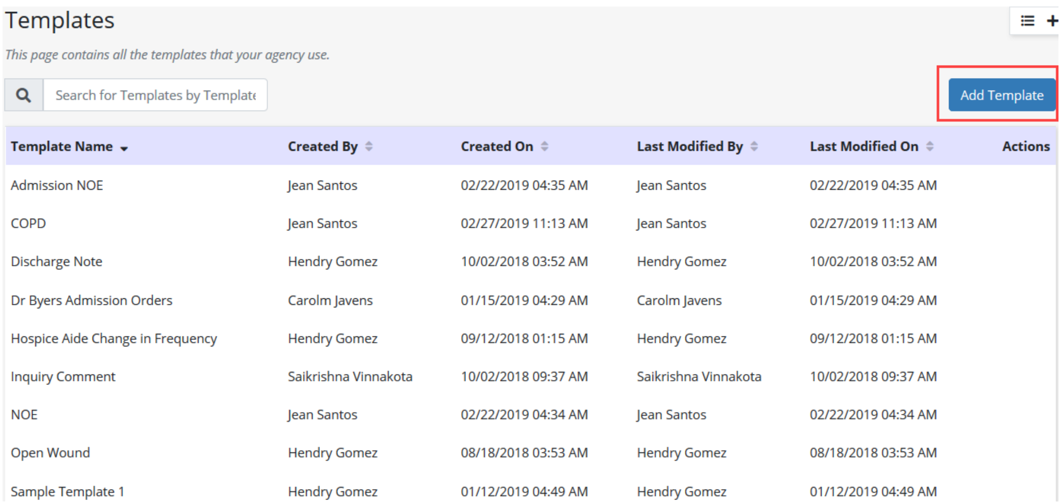
Payor Name	Display Name	Bill Type	Payor Type	Phone	Fax	Actions
Wellpoint Inc	Wellpoint Inc	Institutional (UB-04)	Private Insurance/Medigap		(888) 888-8888	Edit Delete
Unitedhealth Group	Unitedhealth Group		None		Not Available	Edit Delete
Unitedhealth Group	Unitedhealth Group	Professional (CMS-1500)	Private managed care	(777) 777-7777	Not Available	Edit Delete
Tricare	Tricare	Institutional (UB-04)	Other government (e.g., TRICARE, VA, etc.)		Not Available	Edit Delete
TRICARE	TRICARE	Institutional (UB-04)	Other government (e.g., TRICARE, VA, etc.)	(124) 585-4555	(872) 595-8655	Edit Delete
Medicare Default Payor	Medicare	Institutional (UB-04)	Medicare (traditional fee-for-service)	Not Available	Not Available	Edit
Medicaid	TMHP	Institutional (UB-04)	Medicaid (traditional fee-for-service)	(512) 415-4441	Not Available	Edit Delete
Humana	Humana	Institutional (UB-04)	Medicare (managed care/Part C/Medicare Advantage)	(817) 454-4444	Not Available	Edit Delete

ADDING TEMPLATES

List/Templates

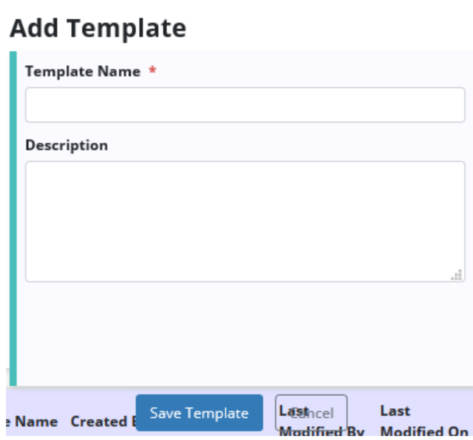


The window below will appear. Search through the list of current templates by starting to type the Template Name in the search bar in the top left. Select the 1 2 16 total results at the bottom left of the page to navigate if results are more than one page. Select the "Add Template" button to create a new template.



Template Name	Created By	Created On	Last Modified By	Last Modified On	Actions
Admission NOE	Jean Santos	02/22/2019 04:35 AM	Jean Santos	02/22/2019 04:35 AM	
COPD	Jean Santos	02/27/2019 11:13 AM	Jean Santos	02/27/2019 11:13 AM	
Discharge Note	Hendry Gomez	10/02/2018 03:52 AM	Hendry Gomez	10/02/2018 03:52 AM	
Dr Byers Admission Orders	Carolm Javens	01/15/2019 04:29 AM	Carolm Javens	01/15/2019 04:29 AM	
Hospice Aide Change in Frequency	Hendry Gomez	09/12/2018 01:15 AM	Hendry Gomez	09/12/2018 01:15 AM	
Inquiry Comment	Saikrishna Vinnakota	10/02/2018 09:37 AM	Saikrishna Vinnakota	10/02/2018 09:37 AM	
NOE	Jean Santos	02/22/2019 04:34 AM	Jean Santos	02/22/2019 04:34 AM	
Open Wound	Hendry Gomez	08/18/2018 03:53 AM	Hendry Gomez	08/18/2018 03:53 AM	
Sample Template 1	Hendry Gomez	01/12/2019 04:49 AM	Hendry Gomez	01/12/2019 04:49 AM	

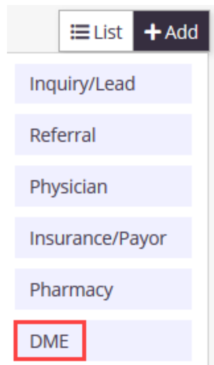
Create a Name for the template. Then write the template inside the Description. Once completed, select the "Save Template" button.



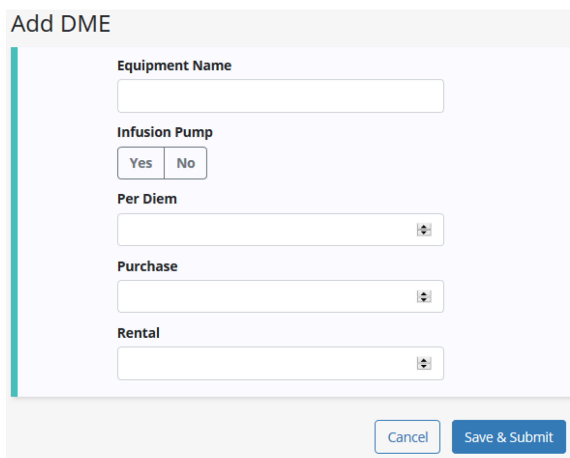
NOTE: Templates can be used to save time for writing orders, goals, care plans, physician statements, narratives and other places inside visits.

ADDING DME

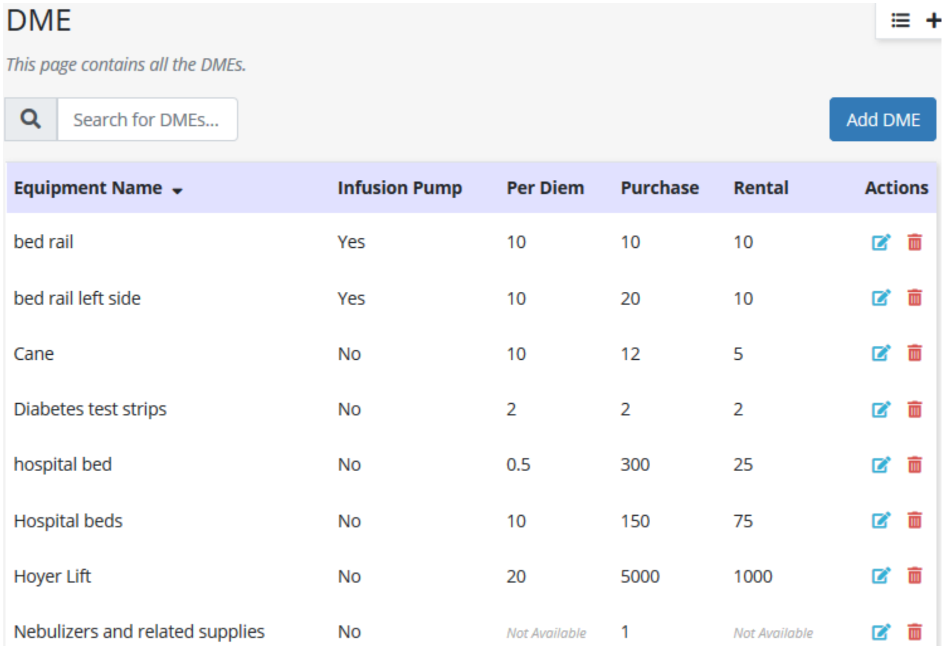
Add/DME



A new window will appear. Enter the Equipment Name and then decide whether the DME (Durable Medical Equipment) is an Infusion Pump. Then enter the price for Per Diem, Purchase and Rental for the DME. When finished, select the "Save & Submit" button at the bottom.



Then the user will be taken to a list of DME. Search through the current list by typing the Equipment Name in the search bar in the top left. Edit or Delete by selecting the icons under the Actions column. Users can also add additional DME by selecting the "Add DME" button in the top right.

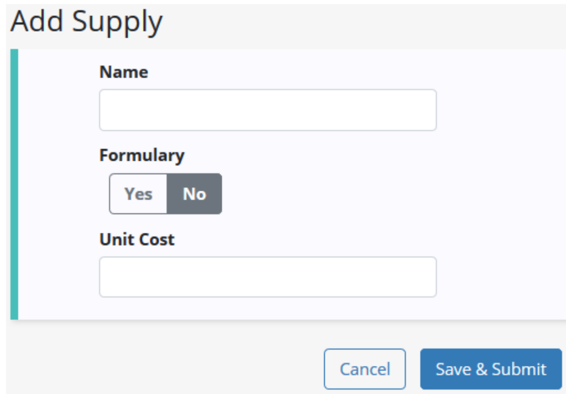


Equipment Name	Infusion Pump	Per Diem	Purchase	Rental	Actions
bed rail	Yes	10	10	10	
bed rail left side	Yes	10	20	10	
Cane	No	10	12	5	
Diabetes test strips	No	2	2	2	
hospital bed	No	0.5	300	25	
Hospital beds	No	10	150	75	
Hoyer Lift	No	20	5000	1000	
Nebulizers and related supplies	No	Not Available	1	Not Available	

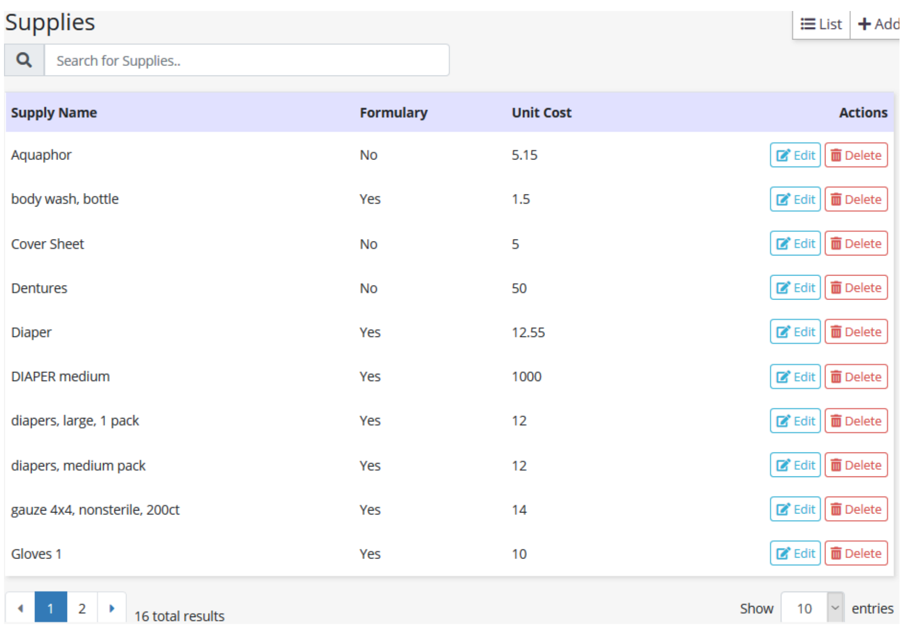
ADDING SUPPLIES

Add/Supplies

A new window will appear. Enter the supply Name, indicate whether the supply is formulary and enter Unit Cost. When finished, select the “Save & Submit” button at the bottom.



A confirmation window will appear, select "Ok." Then the user will be taken to a list of supplies. Search through the current list by typing the supply name in the search bar in the top left. Edit or Delete by selecting the buttons under the Actions column.



Supplies

List | Add

Search for Supplies..

Supply Name	Formulary	Unit Cost	Actions
Aquaphor	No	5.15	Edit Delete
body wash, bottle	Yes	1.5	Edit Delete
Cover Sheet	No	5	Edit Delete
Dentures	No	50	Edit Delete
Diaper	Yes	12.55	Edit Delete
DIAPER medium	Yes	1000	Edit Delete
diapers, large, 1 pack	Yes	12	Edit Delete
diapers, medium pack	Yes	12	Edit Delete
gauze 4x4, nonsterile, 200ct	Yes	14	Edit Delete
Gloves 1	Yes	10	Edit Delete

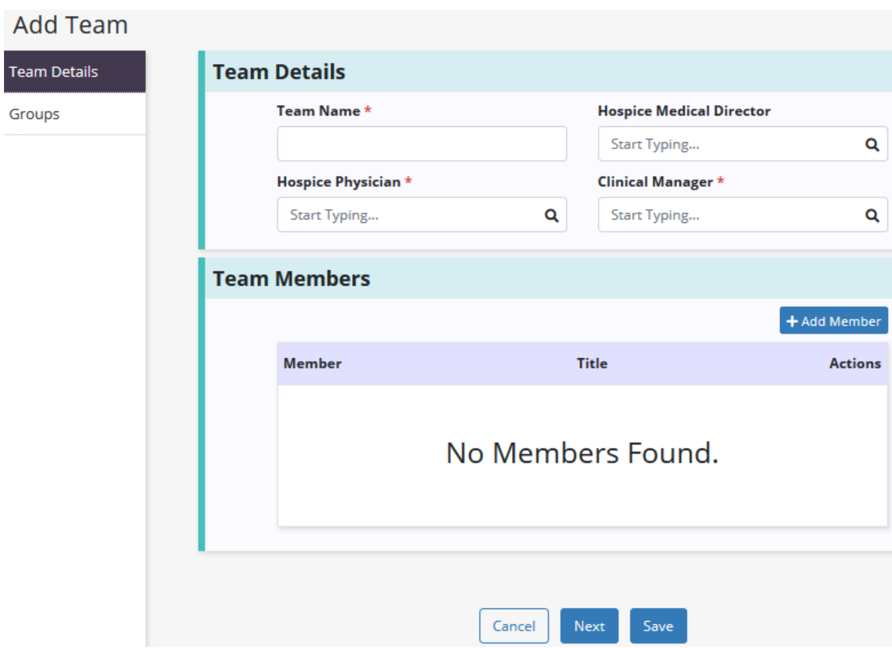
1 2 16 total results

Show 10 entries

ADD TEAMS

Add/Team

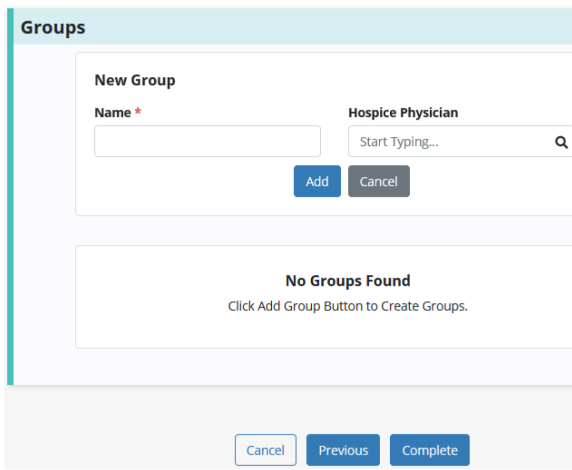
Enter a Team Name. Start typing the name of the Hospice Medical Director, Physician and Clinical Manager. After typing, names will then be available for selection.



Select the "+Add Member" button to add team members.

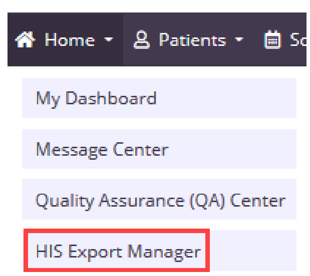
Start typing member name and then select the name. Once found, select “Add Selected Member.” Once all team members have been added, select “Save” at the bottom of the page.

Groups – The next tab on the left in the Add Team section is for Groups. Select the “+Add Group” button in the top right to add a group. Enter a group name and add an optional Hospice Physician by typing the name then selecting the physician. After all desired groups have been added, select the “Complete” button.

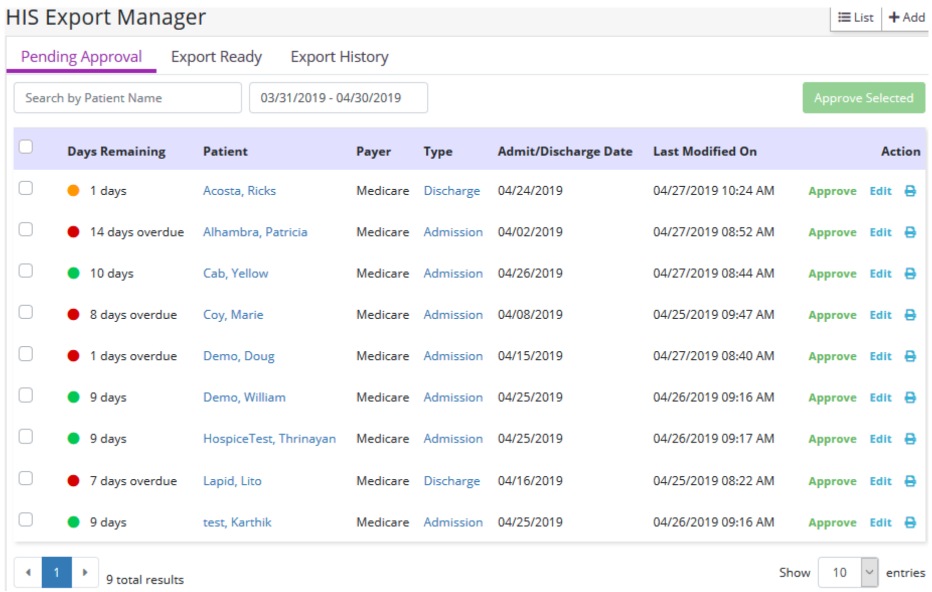


HIS EXPORT

Home/HIS Export Manager



Users can manage the exporting of HIS documents from the Pending Approval, Export Ready and Export History tabs.


HIS Export Manager List + Add

Pending Approval Export Ready Export History

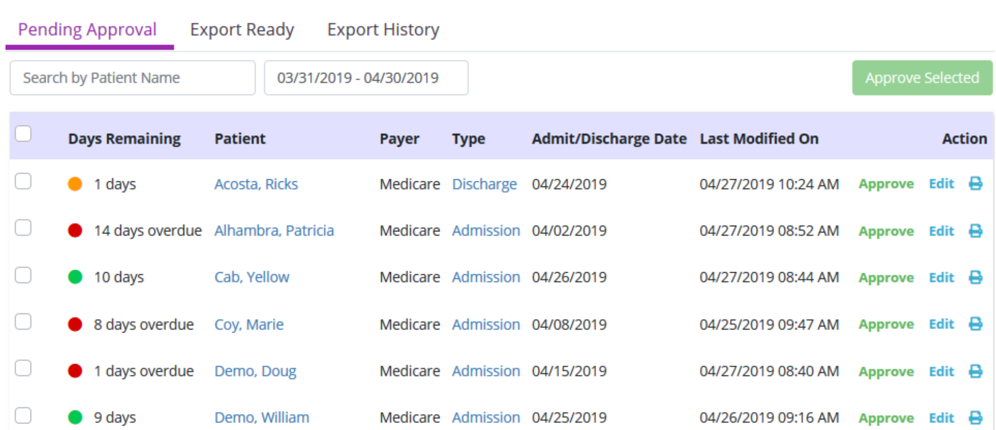
Search by Patient Name 03/31/2019 - 04/30/2019 Approve Selected

	Days Remaining	Patient	Payer	Type	Admit/Discharge Date	Last Modified On	Action
	1 days	Acosta, Ricks	Medicare	Discharge	04/24/2019	04/27/2019 10:24 AM	Approve Edit
	14 days overdue	Alhambra, Patricia	Medicare	Admission	04/02/2019	04/27/2019 08:52 AM	Approve Edit
	10 days	Cab, Yellow	Medicare	Admission	04/26/2019	04/27/2019 08:44 AM	Approve Edit
	8 days overdue	Coy, Marie	Medicare	Admission	04/08/2019	04/25/2019 09:47 AM	Approve Edit
	1 days overdue	Demo, Doug	Medicare	Admission	04/15/2019	04/27/2019 08:40 AM	Approve Edit
	9 days	Demo, William	Medicare	Admission	04/25/2019	04/26/2019 09:16 AM	Approve Edit
	9 days	HospiceTest, Thrinayan	Medicare	Admission	04/25/2019	04/26/2019 09:17 AM	Approve Edit
	7 days overdue	Lapid, Lito	Medicare	Discharge	04/16/2019	04/25/2019 08:22 AM	Approve Edit
	9 days	test, Karthik	Medicare	Admission	04/25/2019	04/26/2019 09:16 AM	Approve Edit

1 9 total results Show 10 entries

In each tab, search for patients by name in the search bar and/or change the date range of HIS by selecting the date range bar.

Pending Approval – Where the reviewer will review and make changes to the HIS as needed. The reviewer will be able to sign in Z0400 for any changes they make as well as be able to approve the HIS and sign in Z0500 that the HIS is completed. After the HIS is approved, it will be moved to the Export Ready tab. Admission HIS will have a countdown for approval of admission date + 14 days, and the Discharge HIS will have a countdown for approval of discharge date + 7 days.


Pending Approval Export Ready Export History

Search by Patient Name 03/31/2019 - 04/30/2019 Approve Selected

	Days Remaining	Patient	Payer	Type	Admit/Discharge Date	Last Modified On	Action
	1 days	Acosta, Ricks	Medicare	Discharge	04/24/2019	04/27/2019 10:24 AM	Approve Edit
	14 days overdue	Alhambra, Patricia	Medicare	Admission	04/02/2019	04/27/2019 08:52 AM	Approve Edit
	10 days	Cab, Yellow	Medicare	Admission	04/26/2019	04/27/2019 08:44 AM	Approve Edit
	8 days overdue	Coy, Marie	Medicare	Admission	04/08/2019	04/25/2019 09:47 AM	Approve Edit
	1 days overdue	Demo, Doug	Medicare	Admission	04/15/2019	04/27/2019 08:40 AM	Approve Edit
	9 days	Demo, William	Medicare	Admission	04/25/2019	04/26/2019 09:16 AM	Approve Edit

The dots next to each line represent timing of when HIS is due. Red is overdue, orange is nearly due and green is safe to approve.

Each line will show the Days Remaining, Patient name (selected will go to patient chart), Payer, Type (selected will go to HIS), Admit/Discharge Date and Last Modified On. The Action column hyperlinks allow users to Approve, Edit or Print the HIS.

	Days Remaining	Patient	Payer	Type	Admit/Discharge Date	Last Modified On	Action
	0 days	Acosta, Ricks	Medicare	Discharge	04/24/2019	04/27/2019 10:24 AM	Approve Edit

Approve multiple HIS documents by selecting the checkbox(es) on the left side of the page and then select the "Approve Selected" button in the top right.

Search by Patient Name | 04/01/2019 - 05/01/2019 | 2 | Approve Selected 2

	Days Remaining	Patient	Payer	Type	Admit/Discharge Date	Last Modified On	Action
	0 days	Acosta, Ricks	Medicare	Discharge	04/24/2019	04/27/2019 10:24 AM	Approve Edit
	15 days overdue	Alhambra, Patricia	Medicare	Admission	04/02/2019	04/27/2019 08:52 AM	Approve Edit
1	9 days	Cab, Yellow	Medicare	Admission	04/26/2019	04/27/2019 08:44 AM	Approve Edit
	9 days overdue	Coy, Marie	Medicare	Admission	04/08/2019	04/25/2019 09:47 AM	Approve Edit

Export Ready – Where all HIS awaiting export are located. The countdown for submission is 30 days after the admission or discharge date. Users can create export files of individual files or perform a bulk submission. Once the files are downloaded into the appropriate format, they are found in Downloaded Files on the user's computer. From there, submit the HIS per agency guidelines and then return to this page to mark HIS as Submitted.

Pending Approval | Export Ready | Export History

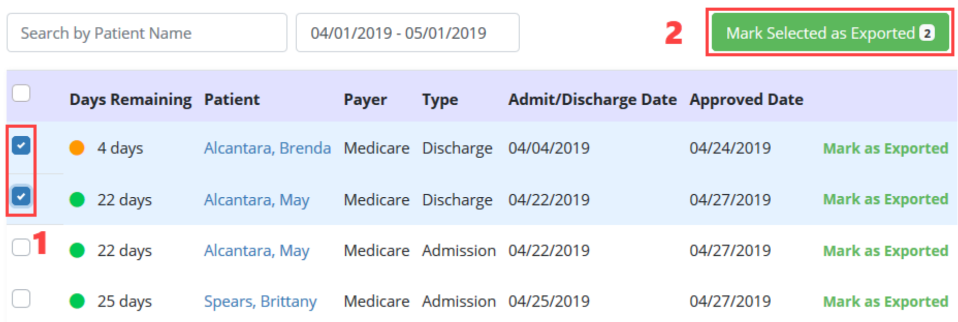
Search by Patient Name | 04/01/2019 - 05/01/2019 | Mark Selected as Exported | Generate HIS File

	Days Remaining	Patient	Payer	Type	Admit/Discharge Date	Approved Date	Action
	4 days	Alcantara, Brenda	Medicare	Discharge	04/04/2019	04/24/2019	Mark as Exported Generate HIS File
	22 days	Alcantara, May	Medicare	Discharge	04/22/2019	04/27/2019	Mark as Exported Generate HIS File
	22 days	Alcantara, May	Medicare	Admission	04/22/2019	04/27/2019	Mark as Exported Generate HIS File
	25 days	Spears, Brittany	Medicare	Admission	04/25/2019	04/27/2019	Mark as Exported Generate HIS File

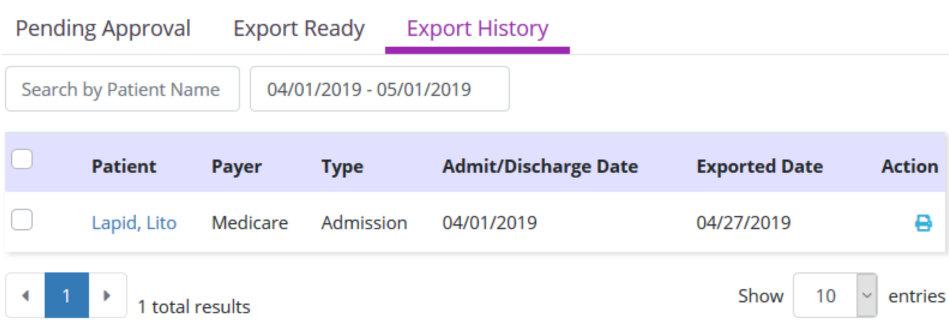
1 | 4 total results | Show 10 entries

Each line will show the Days Remaining, Patient name (selected will go to patient chart), Payer, Type, Admit/Discharge Date and Approved Date. The Action column hyperlinks allow users to Mark as Exported, Generate HIS File or Print.

Mark multiple HIS documents as exported or generate multiple HIS files by selecting the checkbox(es) on the left side of the page and then select the “Mark Selected as Exported” or “Generate HIS File” button in the top right.



Export History – Where users can mark if a HIS was rejected, accepted, and be able to create modifications or inactivate a HIS.



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 on all our Axxess products. Our Help Center can be accessed by selecting *Help/Help Center* or https://www.axxess.com/help/