

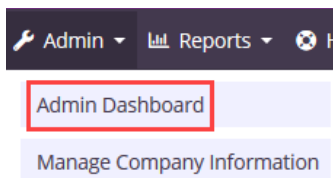
# **HOSPICE ADMINISTRATOR OVERVIEW TRAINING MANUAL**

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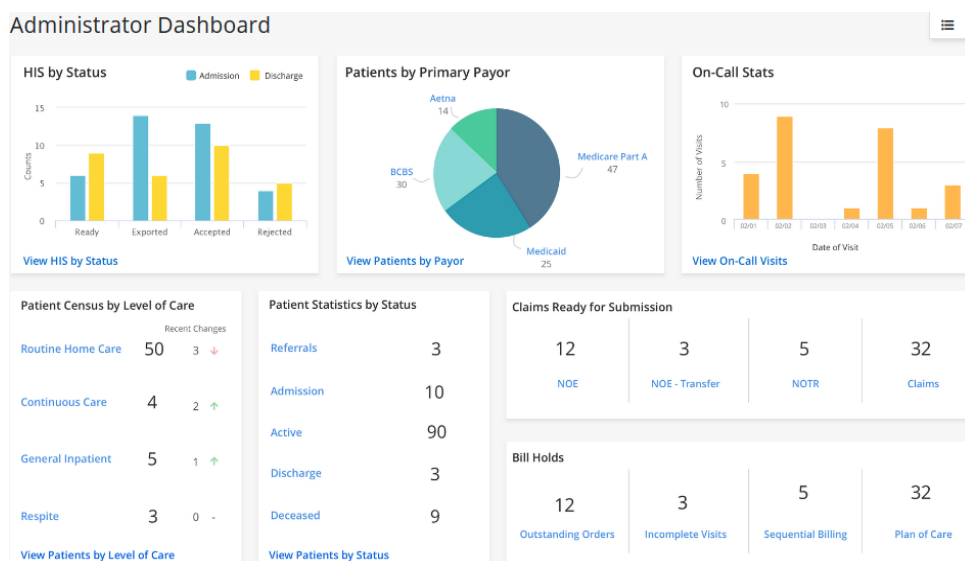
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## ADMIN DASHBOARD

Admin/Admin Dashboard



The Administrator Dashboard is seven different tiles:



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

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

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

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

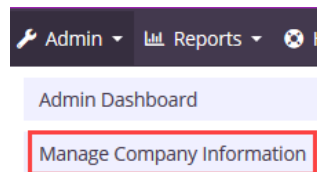
Patient Statistics by Status – Shows the number of patients by Referrals, Admission, Active, Discharge and Deceased.

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

Bill Holds – 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.

Manage Company Information

Company Information  
Financial & Billing  
Intake

### Company Information

<b>Company Name *</b> <input type="text" value="Testing Agency"/>	<b>CAHPS Vendor</b> <input type="text" value="Type to Filter CAHPS Vendors..."/>
<b>Tax ID *</b> <input type="text" value="433599223"/>	<b>National Provider Identifier</b> <input type="text" value="1234674324"/>
<b>Tax ID Type *</b> <input checked="" type="radio"/> Employer Identification Number <input type="radio"/> Social Security Number	<b>Medicare Provider Number</b> <input type="text"/>
<b>Contact First Name *</b> <input type="text" value="Anantharaman"/>	<b>Medicaid Provider Number</b> <input type="text"/>
<b>Contact Last Name *</b> <input type="text" value="Subramanian"/>	<b>Medicaid Provider Identifier</b> <input type="text"/>
<b>Contact Email</b> <input type="text" value="ananthu1987@gmail.com"/>	<b>DME Medicaid Provider Identifier</b> <input type="text"/>
<b>Contact Phone</b> <input type="text" value="Home"/> (214) 773-7075 <input type="text" value="Extn."/>	<b>Assigned Provider Submission Id (FAC_ID)</b> <input type="text"/>

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

**United States Location**

<b>Location Name</b> <input type="text" value="United States"/>	<b>Address Line 1 *</b> <input type="text" value="Dallas Parkway 16000"/>	
<b>Primary Phone</b> <div> Home (666) 666-6666 Extn. </div>	<b>Address Line 2</b> <input type="text" value="1717 E Belt Line Road"/>	
<b>Fax</b> <input type="text"/>	<b>City *</b> <input type="text" value="Coppell"/>	
<b>Time Zone</b> <input type="text" value="(GMT+10:00) Guam, Northern Mariana Islands"/>	<b>State *</b> <input type="text" value="TX"/>	<b>Zip *</b> <input type="text" value="75019"/>

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

Manage Company Information

Company Information  
**Financial & Billing**  
Intake

**Submitter Information**

<b>Submitter ID</b> <input type="text"/>	<b>Submitter Phone</b> <div> Home Extn. </div>
<b>Submitter Name</b> <input type="text"/>	<b>Submitter Fax</b> <input type="text"/>

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.

Manage Company Information

Company Information  
Financial & Billing  
**Intake**



**Referral Intake**

**New Patient Entry \***

- ☐ **Inquiry/Lead** - All patients must be entered into AxxessHospice as a Inquiry/Lead
- ☐ **Referral** - All patients must be entered into AxxessHospice as a Referral (*Bypass Intake/Lead*)

## 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.

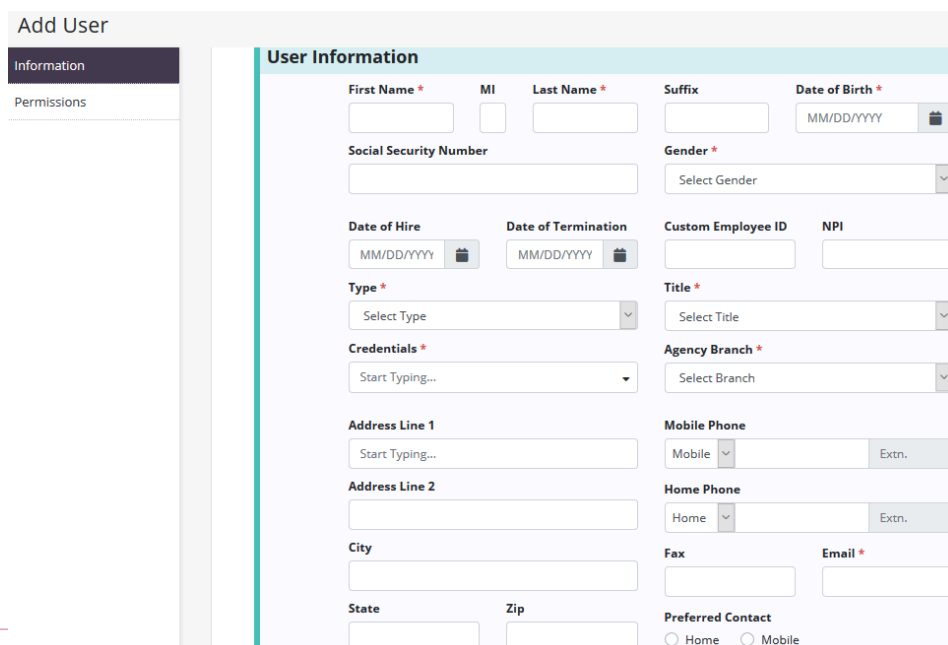
## ADDING A NEW USER

Add/User



- Inquiry/Lead
- Referral
- Physician
- Insurance/Payor
- Pharmacy
- DME
- Vendor
- Supplies
- User**


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





**Add User**

Information  
Permissions

**User Information**

First Name \*    MI    Last Name \*    Suffix    Date of Birth \*  
                MM/DD/YYYY 

Social Security Number    Gender \*  
    Select Gender

Date of Hire    Date of Termination    Custom Employee ID    NPI  
 MM/DD/YYYY     MM/DD/YYYY        

Type \*    Title \*  
 Select Type    Select Title

Credentials \*    Agency Branch \*  
 Start Typing...    Select Branch

Address Line 1    Mobile Phone  
 Start Typing...    Mobile    Extn.

Address Line 2    Home Phone  
    Home    Extn.

City    Fax    Email \*  
       

State    Zip    Preferred Contact  
        ☐ Home    ☐ Mobile

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.

System Roles

Access & Restrictions

☐ Allow Weekend Access

Earliest Login Time

Automatic Logout Time

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.

User Permissions

Administration	Access	Add	Edit	Delete
<input type="checkbox"/> Users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Inquiries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Referrals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Physicians	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Insurance/Payors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Pharmacies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> DME	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Vendors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Supplies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Templates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Manage Company Information	<input type="checkbox"/>			
<input type="checkbox"/> Message Center	<input type="checkbox"/>			
<input type="checkbox"/> QA Center	<input type="checkbox"/>			

Clinical	Access	Add	Edit	Delete	Reassign
<input type="checkbox"/> Schedule	<input type="checkbox"/>				
<input type="checkbox"/> Patient Chart	<input type="checkbox"/>				
<input type="checkbox"/> Orders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Visits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Tasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Shifts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Medication Profile	<input type="checkbox"/>				
<input type="checkbox"/> Allergies	<input type="checkbox"/>				

Billing	Access	Add	Export ANSI	E-Submission
<input type="checkbox"/> NOE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> NOTR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Claims	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> History	<input type="checkbox"/>			

Cancel

Previous

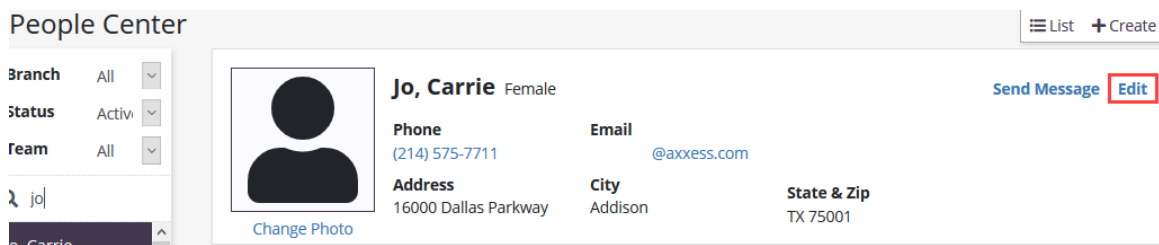
Save

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*



People Center List + Create

Branch All

Status Active

Team All

Search: jo|

Jo, Carrie

**Jo, Carrie** Female Send Message **Edit**

**Phone** (214) 575-7711 **Email** @axxess.com

**Address** 16000 Dallas Parkway **City** Addison **State & Zip** TX 75001

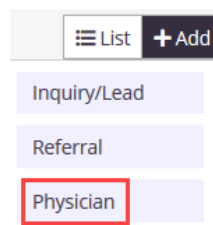
[Change Photo](#)

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*



List + Add

Inquiry/Lead

Referral

**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.



Auto fill form using Physician's NPI

13967019

- 1396701900 - CHRISTOPHER G PIERSON
- 1396701918 - YELITZA RIVERA
- 1396701926 - STEVEN RAYMOND WEBER
- 1396701934 - HILDA MARIAN DE GAETA
- 1396701942 - SANDEEP SAMANT
- 1396701967 - SUSAN MARIE BLANEY
- 1396701975 - KIMBERLY OSGOOD SCH

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/>

Add Physician

Auto fill form using Physician's NPI

Find a Physician by NPI

NPI \*

NPI is required to check if physician is PECOS verified

First Name \*  MI  Last Name \*

Physician's first and last name is required to perform the OIG check

Taxonomy Code  Medical Provider Number

Credentials

Address Line 1 \*

Preferred Phone \*



Address Line 2

Alternate Phone

City \*  State \*  Zip \*

Fax  Email Address

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.

NPI *	First Name *	MI	Last Name *
1396701900	CHRISTOPHI		PIERSON
 The NPI 1396701900 is PECOS Verified.	 CHRISTOPHER PIERSON is NOT in the exclusion list.		
Taxonomy Code	Medical Provider		

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

## ADDING A NEW VENDOR

*Add/Vendor*

List

+ Add

Inquiry/Lead

Referral

Physician

Insurance/Payor

Pharmacy

DME

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.

Add Vendor

Vendor Name \*

Vendor Type \*

Select Vendor type

Medicare Contract Number

Medicaid Contract Number

Contract

Yes

No

Primary Phone

Mobile

Extn.

☐ After Hours
 

Add New Contact

Fax

Email

Contact First Name \*

Contact Last Name \*

Address Line 1 \*

Start Typing...

Address Line 2

City \*

State, Zip \*

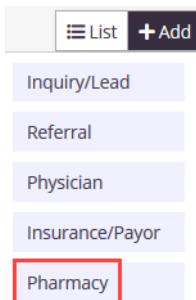
Comments

Cancel

Save & Submit

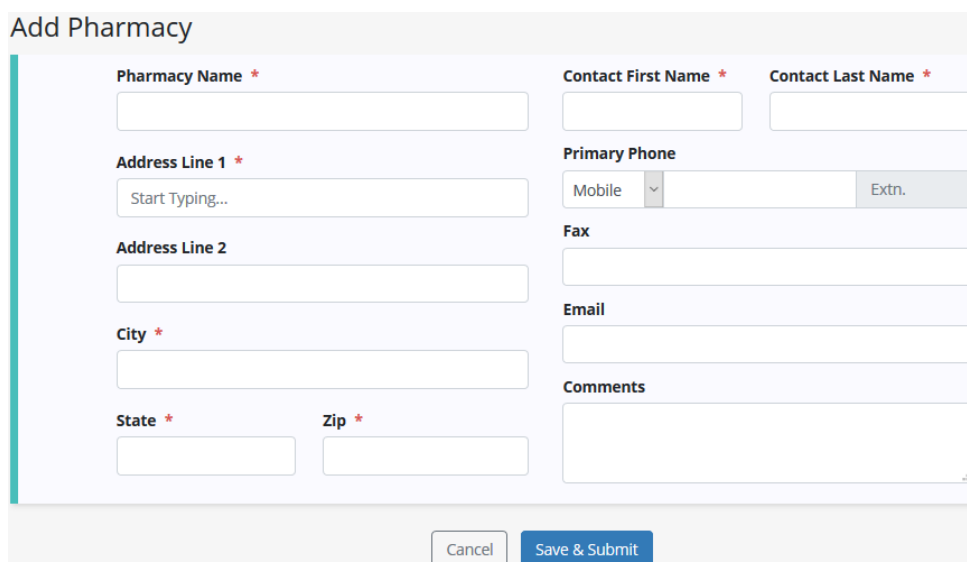
## ADDING A NEW PHARMACY

*Add/Pharmacy*



A screenshot of a software interface showing a dropdown menu. At the top, there are two buttons: 'List' (with a list icon) and 'Add' (with a plus icon). Below these buttons is a list of options: 'Inquiry/Lead', 'Referral', 'Physician', 'Insurance/Payor', and 'Pharmacy'. The 'Pharmacy' option is highlighted with a red rectangular border.

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.



A screenshot of a web form titled 'Add Pharmacy'. The form is divided into two main columns. The left column contains fields for 'Pharmacy Name \*', 'Address Line 1 \*' (with a placeholder 'Start Typing...'), 'Address Line 2', 'City \*', 'State \*', and 'Zip \*'. The right column contains fields for 'Contact First Name \*', 'Contact Last Name \*', 'Primary Phone' (with a dropdown menu set to 'Mobile' and an 'Extn.' field), 'Fax', 'Email', and 'Comments'. At the bottom of the form, there are two buttons: 'Cancel' and 'Save & Submit'.

## 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.


To be Sent Pending Signature								
<input type="text" value="Search by Patient Name"/> <input type="text" value="Search by Physician"/> <input type="text" value="Type to Filter Type..."/> <input type="text" value="Order Date"/> <input type="button" value="Mark Selected as Sent"/>								
<input type="checkbox"/>	Age of Order	Patient	Physician	Type	Order Date	Date Approved	Order Preview	Action
<input type="checkbox"/>	13 days	Acosta, Sandra		Plan of Care	02/15/2019	01/11/2019		Mark as Sent
<input type="checkbox"/>	4 days	Dolan, Jacqueline	HANSBERRY, MARIA	Physician Order	02/24/2019	01/11/2019		Mark as Sent
<input type="checkbox"/>	8 days	Dolan, Jacqueline		Plan of Care	02/20/2019	01/11/2019		Mark as Sent
<input type="checkbox"/>	5 days	Dolan, Jacqueline	HANSBERRY, MARIA	Certification of Terminal Illness	02/23/2019	01/11/2019		Mark as Sent
<input type="checkbox"/>	144 days	Graves, Sallie	GRENDON, MICHAELTODD	Plan of Care	10/07/2018	01/11/2019		Mark as Sent
<input type="checkbox"/>	42 days	Hunt, Marc		Physician Order	01/17/2019	01/11/2019	Stop CC	Mark as Sent
<input type="checkbox"/>	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.

To be Sent		Pending Signature						
Search by Patient Name		Search by Physician		Type to Filter Type...	Order Date		Mark Selected as Received	
<input type="checkbox"/>	Age of Order	Patient	Physician	Type	Order Date	Sent Date	Order Preview	Action
<input type="checkbox"/>	18 days	Brady, Jonathan	LODHI, OWAIS	Physician Order	02/10/2019	01/11/2019	Visits	Mark as Received 
<input type="checkbox"/>	38 days	Brennan, Chris	JONES, ZAUNDRA	Physician Order	01/21/2019	01/11/2019	test	Mark as Received 
<input type="checkbox"/>	72 days	Brennan, Tom	JONES, ZAUNDRA	Certification of Terminal Illness	12/18/2018	01/11/2019		Mark as Received 
<input type="checkbox"/>	150 days	Cook, Martha	LODHI, OWAIS	Certification of Terminal Illness	10/01/2018	01/11/2019		Mark as Received 
<input type="checkbox"/>	29 days	Greenwood, Donna	Robison, George	Plan of Care	01/30/2019	01/11/2019		Mark as Received 
<input type="checkbox"/>	29 days	Greenwood, Donna	Robison, George	Certification of Terminal Illness	01/30/2019	01/11/2019		Mark as Received 
<input type="checkbox"/>	29 days	Greenwood, Donna	RADEN, KAREN	Hospice Physician Face to Face Visit	01/30/2019	01/11/2019		Mark as Received 
<input type="checkbox"/>	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.

Brady, Jonathan
LODHI, OWAIS
Physician Order
02/10/2019
01/11/2019
Visits
Marking In Progress

Received Date
02/28/2019

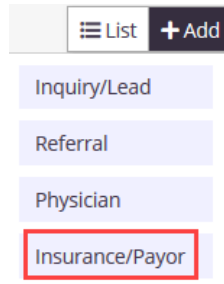
Signed Date
MM/DD/YYYY

Mark
Cancel

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

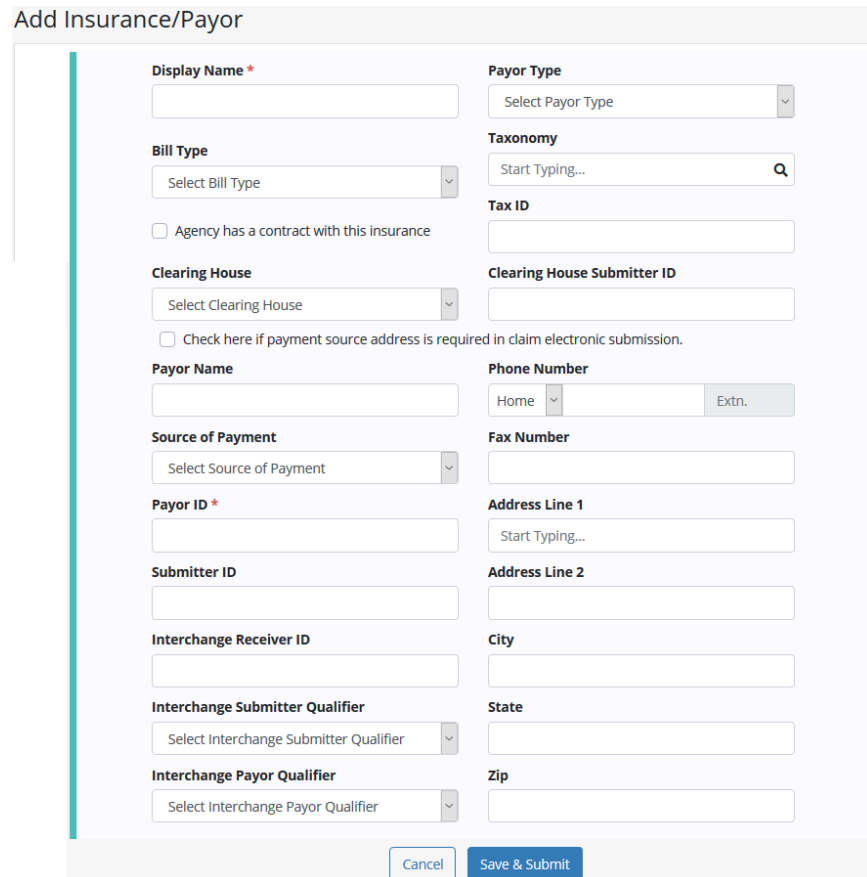
## ADDING AN INSURANCE/PAYER

*Add/Insurance\_Payer*



The screenshot shows a vertical menu with the following options: Inquiry/Lead, Referral, Physician, and Insurance/Payor. The 'Insurance/Payor' option is highlighted with a red rectangular box.

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.



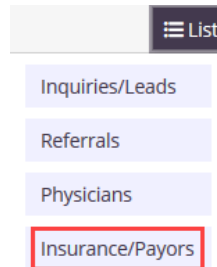
The screenshot shows the 'Add Insurance/Payor' form with the following fields and options:

- Display Name \***: Text input field.
- Payor Type**: Dropdown menu with 'Select Payor Type'.
- Bill Type**: Dropdown menu with 'Select Bill Type'.
- Taxonomy**: Text input field with 'Start Typing...' and a search icon.
- Agency has a contract with this insurance**: Checkbox.
- Tax ID**: Text input field.
- Clearing House**: Dropdown menu with 'Select Clearing House'.
- Clearing House Submitter ID**: Text input field.
- Check here if payment source address is required in claim electronic submission.**: Checkbox.
- Payor Name**: Text input field.
- Phone Number**: Text input field with 'Home' dropdown and 'Extn.' field.
- Source of Payment**: Dropdown menu with 'Select Source of Payment'.
- Fax Number**: Text input field.
- Payor ID \***: Text input field.
- Address Line 1**: Text input field with 'Start Typing...'.
- Submitter ID**: Text input field.
- Address Line 2**: Text input field.
- Interchange Receiver ID**: Text input field.
- City**: Text input field.
- Interchange Submitter Qualifier**: Dropdown menu with 'Select Interchange Submitter Qualifier'.
- State**: Text input field.
- Interchange Payor Qualifier**: Dropdown menu with 'Select Interchange Payor Qualifier'.
- Zip**: Text input field.

At the bottom of the form are two buttons: 'Cancel' and 'Save & Submit'.

## EDITING EXISTING INSURANCE/PAYERS

*List/Insurance\_Payers*

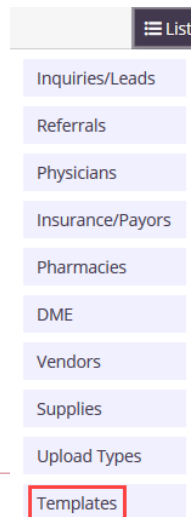


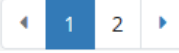
Select the “Edit” hyperlink to the far right of the screen under the Action column. This is also where the “Delete” function is found. To search for a payer, Start Typing any part of the Payer Name, Display Name, Bill Type, Payer Type, Phone or Fax in the white free text space at the top left of the 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	<a href="#">Edit</a> <a href="#">Delete</a>
Unitedhealth Group	Unitedhealth Group		None		Not Available	<a href="#">Edit</a> <a href="#">Delete</a>
Unitedhealth Group	Unitedhealth Group Professional (CMS-1500)		Private managed care	(777) 777-7777	Not Available	<a href="#">Edit</a> <a href="#">Delete</a>
Tricare	Tricare	Institutional (UB-04)	Other government (e.g., TRICARE, VA, etc.)		Not Available	<a href="#">Edit</a> <a href="#">Delete</a>
TRICARE	TRICARE	Institutional (UB-04)	Other government (e.g., TRICARE, VA, etc.)	(124) 585-4555	(872) 595-8655	<a href="#">Edit</a> <a href="#">Delete</a>
Medicare	<a href="#">Default Payor</a> Medicare	Institutional (UB-04)	Medicare (traditional fee-for-service)	Not Available	Not Available	<a href="#">Edit</a>
Medicaid	TMHP	Institutional (UB-04)	Medicaid (traditional fee-for-service)	(512) 415-4441	Not Available	<a href="#">Edit</a> <a href="#">Delete</a>
Humana	Humana	Institutional (UB-04)	Medicare (managed care/Part C/Medicare Advantage)	(817) 454-4444	Not Available	<a href="#">Edit</a> <a href="#">Delete</a>

## ADDING TEMPLATES


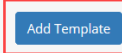
*List/Templates*



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  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.

**Templates** 

*This page contains all the templates that your agency use.*

 Search for Templates by 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.

**Add Template**

**Template Name \***

**Description**

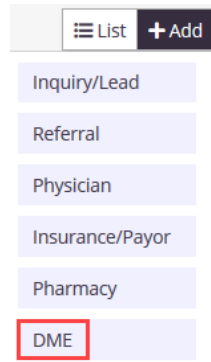
   

**NOTE:** Templates can be used to save time for writing orders, goals, care plans, physician statements, narratives and other places inside visits.



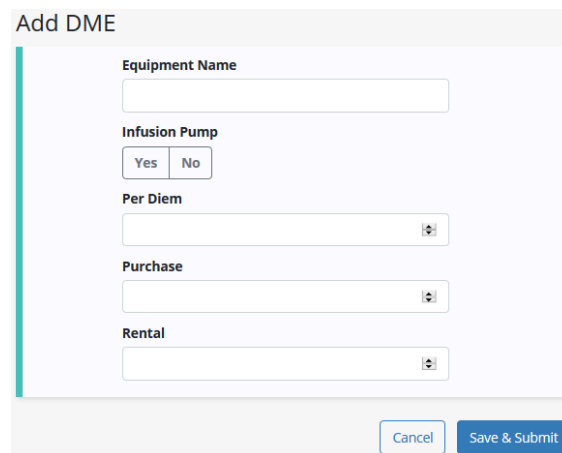
## ADDING DME

Add/DME



A screenshot of a web application's 'Add' dropdown menu. The menu is open, showing a list of options: Inquiry/Lead, Referral, Physician, Insurance/Payor, Pharmacy, and DME. The 'DME' option is highlighted with a red rectangular border.

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.



A screenshot of the 'Add DME' form. The form has a title 'Add DME' and a light blue background. It contains the following fields and controls:

- Equipment Name:** A text input field.
- Infusion Pump:** Two radio buttons labeled 'Yes' and 'No'.
- Per Diem:** A text input field with a currency symbol icon on the right.
- Purchase:** A text input field with a currency symbol icon on the right.
- Rental:** A text input field with a currency symbol icon on the right.
- Buttons:** At the bottom right, there are two buttons: 'Cancel' and 'Save & Submit'.

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.

DME

+

*This page contains all the DMEs.*

Q

Add DME

Equipment Name ▾	Infusion Pump	Per Diem	Purchase	Rental	Actions
bed rail	Yes	10	10	10	<a href="#">✎</a> <a href="#">✖</a>
bed rail left side	Yes	10	20	10	<a href="#">✎</a> <a href="#">✖</a>
Cane	No	10	12	5	<a href="#">✎</a> <a href="#">✖</a>
Diabetes test strips	No	2	2	2	<a href="#">✎</a> <a href="#">✖</a>
hospital bed	No	0.5	300	25	<a href="#">✎</a> <a href="#">✖</a>
Hospital beds	No	10	150	75	<a href="#">✎</a> <a href="#">✖</a>
Hoyer Lift	No	20	5000	1000	<a href="#">✎</a> <a href="#">✖</a>
Nebulizers and related supplies	No	Not Available	1	Not Available	<a href="#">✎</a> <a href="#">✖</a>

## ADDING SUPPLIES

### Add/Supplies

List

+

Add

Inquiry/Lead

Referral

Physician

Insurance/Payor

Pharmacy

DME

Vendor

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.

### Add Supply

**Name**

**Formulary**

**Unit Cost**

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

Supply Name	Formulary	Unit Cost	Actions
Aquaphor	No	5,15	<a href="#">Edit</a> <a href="#">Delete</a>
body wash, bottle	Yes	1,5	<a href="#">Edit</a> <a href="#">Delete</a>
Cover Sheet	No	5	<a href="#">Edit</a> <a href="#">Delete</a>
Dentures	No	50	<a href="#">Edit</a> <a href="#">Delete</a>
Diaper	Yes	12,55	<a href="#">Edit</a> <a href="#">Delete</a>
DIAPER medium	Yes	1000	<a href="#">Edit</a> <a href="#">Delete</a>
diapers, large, 1 pack	Yes	12	<a href="#">Edit</a> <a href="#">Delete</a>
diapers, medium pack	Yes	12	<a href="#">Edit</a> <a href="#">Delete</a>
gauze 4x4, nonsterile, 200ct	Yes	14	<a href="#">Edit</a> <a href="#">Delete</a>
Gloves 1	Yes	10	<a href="#">Edit</a> <a href="#">Delete</a>

1 2 16 total results Show 10 entries

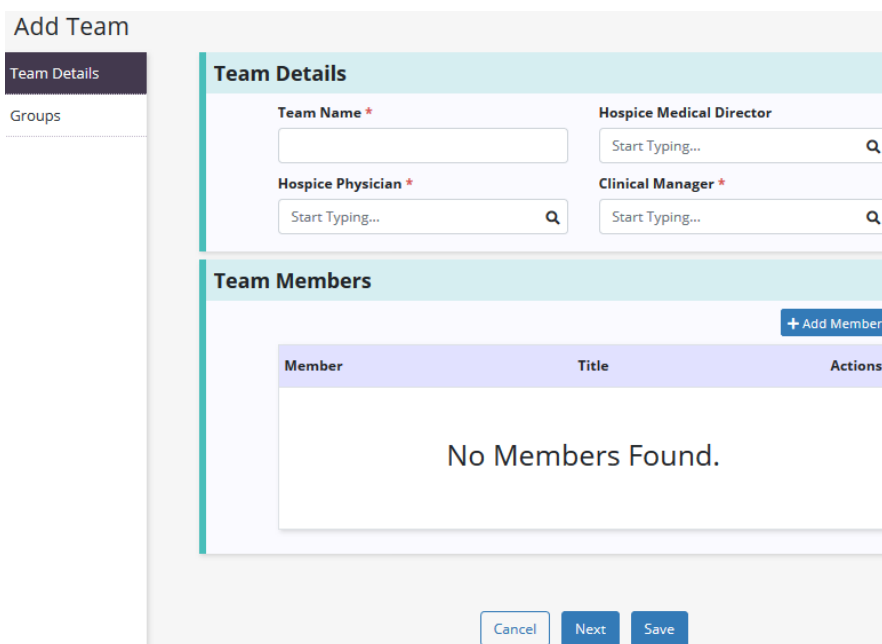
## ADD TEAMS

*Add/Team*



A dropdown menu with a 'List' icon and a '+ Add' button. The menu contains the following options: Inquiry/Lead, Referral, Physician, Insurance/Payor, Pharmacy, DME, Vendor, Supplies, User, and Team. The 'Team' option is highlighted with a red border.

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.



The 'Add Team' form is divided into two main sections: 'Team Details' and 'Team Members'.

**Team Details:**

- Team Name \***: A text input field.
- Hospice Medical Director**: A search input field with a magnifying glass icon.
- Hospice Physician \***: A search input field with a magnifying glass icon.
- Clinical Manager \***: A search input field with a magnifying glass icon.

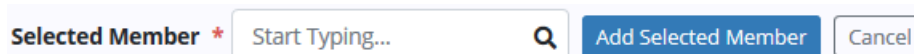
**Team Members:**

- A '+ Add Member' button is located at the top right of the section.
- Below the button is a table with the following structure:
 

Member	Title	Actions
No Members Found.		

At the bottom of the form are three buttons: 'Cancel', 'Next', and 'Save'.

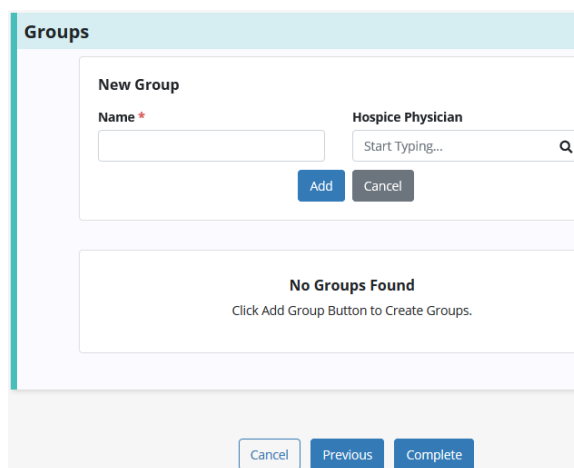
Select the “+Add Member” button to add team members.



A search bar labeled 'Selected Member \*' with a magnifying glass icon. To the right of the search bar are two buttons: 'Add Selected Member' and 'Cancel'.

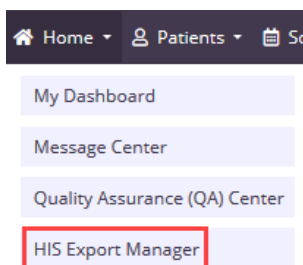
Start typing member name and then select the name. Once found, select “Add Selected Member.” Once all team members have been added, select “Save” at the bottom of the page.

**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

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

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.

Search by Patient Name 04/01/2019 - 05/01/2019

**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

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

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.

<input type="checkbox"/>	Days Remaining	Patient	Payer	Type	Admit/Discharge Date	Last Modified On	Action
<input type="checkbox"/>	● 0 days	Acosta, Ricks	Medicare	Discharge	04/24/2019	04/27/2019 10:24 AM	<a href="#">Approve</a> <a href="#">Edit</a> <a href="#">Print</a>

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		<a href="#">Approve Selected 2</a>	
<input type="checkbox"/>	Days Remaining	Patient	Payer	Type	Admit/Discharge Date	Last Modified On	Action
<input checked="" type="checkbox"/>	● 0 days	Acosta, Ricks	Medicare	Discharge	04/24/2019	04/27/2019 10:24 AM	<a href="#">Approve</a> <a href="#">Edit</a> <a href="#">Print</a>
<input checked="" type="checkbox"/>	● 15 days overdue	Alhambra, Patricia	Medicare	Admission	04/02/2019	04/27/2019 08:52 AM	<a href="#">Approve</a> <a href="#">Edit</a> <a href="#">Print</a>
<input type="checkbox"/>	● 9 days	Cab, Yellow	Medicare	Admission	04/26/2019	04/27/2019 08:44 AM	<a href="#">Approve</a> <a href="#">Edit</a> <a href="#">Print</a>
<input type="checkbox"/>	● 9 days overdue	Coy, Marie	Medicare	Admission	04/08/2019	04/25/2019 09:47 AM	<a href="#">Approve</a> <a href="#">Edit</a> <a href="#">Print</a>

**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

<input type="checkbox"/>	Days Remaining	Patient	Payer	Type	Admit/Discharge Date	Approved Date			
<input type="checkbox"/>	<div><div></div>4 days</div>	Alcantara, Brenda	Medicare	Discharge	04/04/2019	04/24/2019	Mark as Exported	Generate HIS File	
<input type="checkbox"/>	<div><div></div>22 days</div>	Alcantara, May	Medicare	Discharge	04/22/2019	04/27/2019	Mark as Exported	Generate HIS File	
<input type="checkbox"/>	<div><div></div>22 days</div>	Alcantara, May	Medicare	Admission	04/22/2019	04/27/2019	Mark as Exported	Generate HIS File	
<input type="checkbox"/>	<div><div></div>25 days</div>	Spears, Brittany	Medicare	Admission	04/25/2019	04/27/2019	Mark as Exported	Generate HIS File	

1

4 total results

Show

10

entries

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.

<input type="checkbox"/>	Days Remaining	Patient	Payer	Type	Admit/Discharge Date	Approved Date	Action
<input type="checkbox"/>	4 days	Alcantara, Brenda	Medicare	Discharge	04/04/2019	04/24/2019	<a href="#">Mark as Exported</a> <a href="#">Generate HIS File</a> <a href="#">Print</a>

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.

2

Mark Selected as Exported 2

<input type="checkbox"/>	Days Remaining	Patient	Payer	Type	Admit/Discharge Date	Approved Date	Action
<input checked="" type="checkbox"/>	4 days	Alcantara, Brenda	Medicare	Discharge	04/04/2019	04/24/2019	<a href="#">Mark as Exported</a>
<input checked="" type="checkbox"/>	22 days	Alcantara, May	Medicare	Discharge	04/22/2019	04/27/2019	<a href="#">Mark as Exported</a>
<input type="checkbox"/> 1	22 days	Alcantara, May	Medicare	Admission	04/22/2019	04/27/2019	<a href="#">Mark as Exported</a>
<input type="checkbox"/>	25 days	Spears, Brittany	Medicare	Admission	04/25/2019	04/27/2019	<a href="#">Mark as Exported</a>

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

Pending Approval
Export Ready
Export History

<input type="checkbox"/>	Patient	Payer	Type	Admit/Discharge Date	Exported Date	Action
<input type="checkbox"/>	Lapid, Lito	Medicare	Admission	04/01/2019	04/27/2019	<a href="#">Print</a>

◀
1
▶

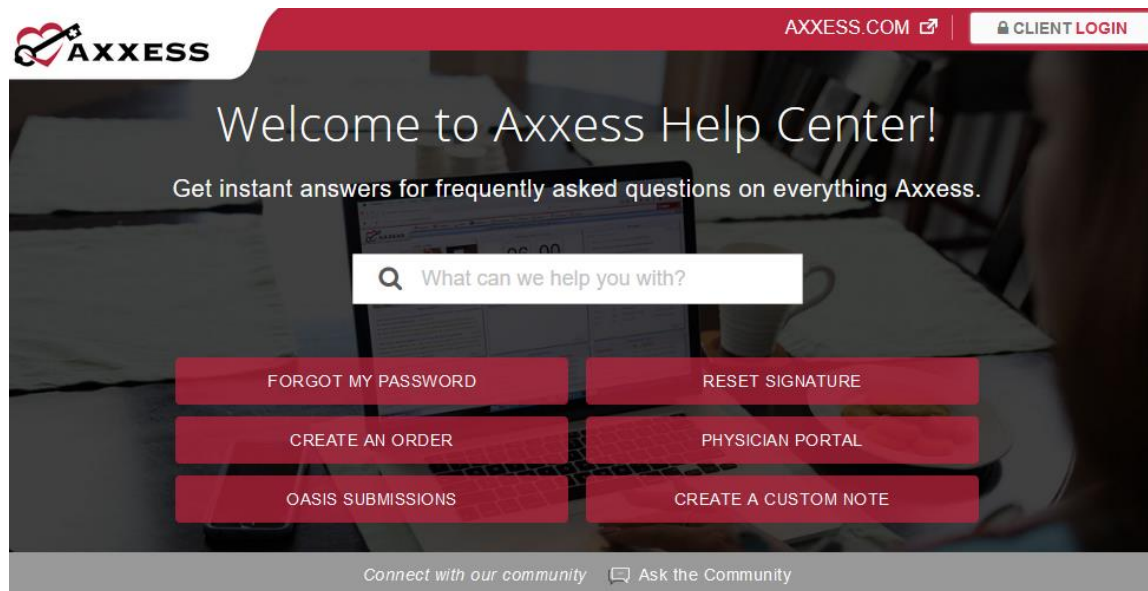
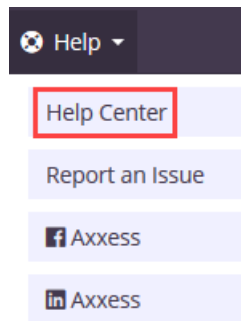
1 total results

Show 10 entries



## 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/>



Get Help Anytime, Anywhere!

