

# OVERVIEW QUICK REFERENCE GUIDE

July 2020

## Table of Contents

LOG IN TO AXXESS .....	3
AXXESS PLANNER.....	3
Home .....	3
Create.....	3
View.....	4
Patients.....	4
Schedule.....	5
Axxess CARE .....	5
Billing .....	6
Admin .....	6
Reports .....	7
Help .....	7
RESET SIGNATURE .....	7
RESET LOGIN PASSWORD.....	8
Current Login Password Is Unknown .....	8
Current Login Password Is Known .....	8
HELP CENTER.....	8

## **LOG IN TO AXXESS**

1. Go to [www.axxess.com](http://www.axxess.com) and select **LOGIN**.
2. Enter your email address and password.
3. Select **Secure Login**.
4. Select **OK**.

## **AXXESS PLANNER**

The Axxess Planner displays pertinent information specific to a user.

- Clinicians are also able to see upcoming visits, past due visits, unread messages, and a map of today's visits.
- Select the appropriate Axxess Home Health application.

## **Navigation Menu**

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

## **Home**

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

- My Account – Quickly edit the user's profile or reset signature.
- My Dashboard – Opens the user's dashboard.
- My Messages – Opens the Message Center to view/send messages.
- My Schedule/Tasks – View the user's schedule/tasks in a list view.
- My Monthly Calendar – View the user's schedule/tasks in a monthly calendar view.
- My Pending Co-Signature Notes – Sign notes that require co-signatures.
- Quality Assurance (QA) Center – View tasks that are pending approval by the QA nurse.
- EVV Exception Center – Manage, correct and resubmit EVV exceptions.

## **Create**

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

- New – Add new items into the system, such as a referral, physician, communication note, etc.

- OASIS Export – View OASIS assessments that are ready to be exported and submitted to CMS.

## View

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

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- Archived Insurances – View insurances that have been archived (no longer in use).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

## Patients

The Patients menu provides access to the following actions based on permissions granted to the user.

- Patient Charts – View patient charts in the system, including active, pending, discharged and non-admitted patients.
- Existing Referrals – View a list of pending referrals and begin the admission process.
- Pending Admissions – View and add a new patient for admission into the system.
- Non-Admissions – View all non-admissions logged in the system. From this screen, users can admit patients who were marked incorrectly.

- Deleted Patients – View patients that have been deleted from the system and restore if necessary.
- Hospitalization Logs – View and track patients that have been transferred to the hospital through a Transfer OASIS.
- Pre-Claim Review Center – Collect and track PCR submission documents seamlessly and effectively.

## Schedule

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

- My Schedule/Tasks – View your schedule/tasks in a list view.
- My Pending Co-Signature Notes – Notes that require a co-signature will be listed here until signed by the responsible co-signer.
- Schedule Unassigned Visits – View all episodes with ordered visits that have been not been fulfilled and schedule/fulfill all frequency orders.
- Schedule Center – Review patient schedules, completed visits and episode information.
- Reassign Schedule – Reassign an employee's schedule to another employee for a specified date range.
- Unscheduled Visits Report – Alerts agencies to assign and schedule visits according to the ordered visit frequency.
- Schedule Report – Generate a schedule report filtered by status, discipline, clinician or patient.
- Schedule Deviation Report – Displays visits that were completed outside of the originally scheduled date.

## Axxess CARE

The Axxess CARE menu provides access to the following actions based on permissions granted to the user.

- Axxess CARE Scheduler – Post visits to Axxess CARE to get visit coverage. **NOTE:** Only agencies in specific states can post visits to Axxess CARE. As Axxess CARE expands to other states, Axxess will alert you through the secure Message Center.
- Posted Visits Summary – Review visits that have been posted to Axxess CARE, along with their current visit statuses and assigned clinicians.

## Billing

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

- Axxess DDE – If your agency has Axxess DDE, users can switch from Axxess Home Health to Axxess DDE here.
- DDE Black Screen – Opens a new browser tab to access the DDE Black Screen.
- Billing Center – Enables users to manage all billing processes in a central location and streamline operations to ensure timely claim submissions.
- Pending Claims – Provides a centralized location for managing all Medicare and Managed Care claims that have outstanding balances.
- Medicare/Medicare HMO (PPS) – Create claims, view claims history and review eligibility for Medicare/Medicare HMO clients.
- Managed Care/Other Insurances – Create claims and review claims history for Managed Care and other insurances.
- All Claims – Review all claims regardless of insurance or bill type.
- Claim Submission History – Review submitted claims and associated responses by batch ID.
- Remittance Advice – Review notices of remittance and electronic fund transfers.

## Admin

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

- New – Add new items into the system, such as a referral, facility, pharmacy, insurance/payer, etc.
- Lists – View items in the system, such as a list of referrals, patients, physicians, insurances/payers, etc.
- Deleted Users – View users that have been deleted from the system and restore deleted users as needed.
- Payroll Export Center – Enables users to generate robust payroll reporting, export ADP (.csv) and Paychex (.txt) vendor files and streamline payroll processing and operations.
- Non-Visit Activity Manager – Manage non-visit activity and mark tasks as paid.
- License Manager – Review all licenses entered into the system and add non-user licenses as needed.

- [Custom Note Manager](#) – View custom notes created from system-generated notes and rename notes as needed.
- [Company Setup](#) – Manage company-wide settings and information.  
**NOTE:** An administrator's signature is required to access this screen.

## Reports

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

- [Report Center](#) – Provides access to reports available within the system.
- [Completed Reports](#) – Some reports will be queued until compiled. Once the data has been compiled, the report will be available here.
- [EVV Exception Center](#) – Manage, correct and resubmit EVV exceptions.

## Help

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

- [Social](#) – Connect with Axxess on social media using the quick links provided in this menu.
- [ICD-10](#) – Reference ICD-10 material including a lookup and ICD-9 to ICD-10 crosswalk.
- [Live Training Webinars](#) – Access live and recorded training webinars on Axxess solutions
- [Support & Training](#) – Visit the Help Center and Axxess Community.
- [Recent Software Updates](#) – View recent software updates.
- [COVID-19 Resource Center](#) – Visit the Axxess COVID-19 Resource Center for best practices, expert training, helpful downloads, PPE resources and other links related to COVID-19.

## **RESET SIGNATURE**

*Home/My Account/Reset Signature.*

1. Select **Reset Signature**.
2. An email with a personalized link will be sent to the email address you use to log in. Click the link in your email.
3. A web browser window will open and prompt you to verify the information and enter a new signature.

4. Select **Change Signature**.
5. Close browser and log back in to Axxess to use the updated signature.

## **RESET LOGIN PASSWORD**

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

### **Current Login Password Is Unknown**

1. Navigate to the login page and select **Forgot your Password?**
2. Enter the email address you use to log in to Axxess.
3. Click **Send** to send a password reset link to your email address.

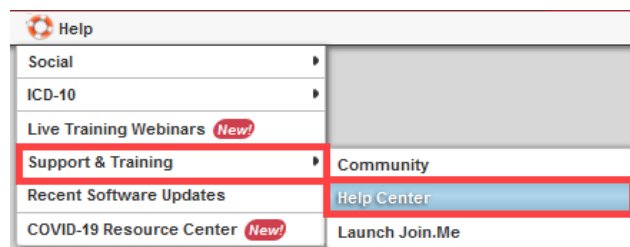
### **Current Login Password Is Known**

*Home/My Account/Edit Profile.*


1. Input your current password and a new password in the boxes provided.
2. Click **Save**.

## **HELP CENTER**

Our on-demand Help Center provides answers to frequently asked questions, step-by-step training and video tutorials on Axxess products. Visit the Help Center by selecting *Support & Training/Help Center* under the *Help* tab or go to <https://www.axxess.com/help/>.






AXXESS.COM
CLIENT LOGIN

## Welcome to Axxess Help Center!

Get instant answers for frequently asked questions on everything Axxess.

FORGOT MY PASSWORD

RESET SIGNATURE

CREATE AN ORDER

PDGM


OASIS SUBMISSIONS


CREATE A CUSTOM NOTE


COVID-19 RESOURCES


[Connect with our community](#)
[Ask the Community](#)


### Get Help Anytime, Anywhere!



Axxess Home Health



Axxess CAHPS


Axxess DDE


Axxess Mobile


Axxess Home Care


Axxess CARE


Axxess Hospice