HOME HEALTH ORDERS MANAGEMENT OVERVIEW MANUAL

July 2021

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ORDERS MANAGEMENT OVERVIEW

View/Orders Management

The Orders Management Center is where users can access sub-menus that include Orders Pending Co-Signature, Orders to be Sent, Orders Pending MD Signature and Orders History. Orders Management can be accessed through the menu bar.

ORDERS PENDING CO-SIGNATURE

View/Orders Management/Orders Pending Co-Signature

User permissions allow the organization to set up specific users to require co-signature on all orders. Once on this screen, the user can filter for Branch, Date Range, as well as search by keyword. Select **Generate** once filters have been updated. The information can also be exported to Microsoft Excel for further analysis by selecting the **Export to Excel** button.

To complete the co-signature process, select the Type hyperlink of the item to be co-signed. A PDF preview of the order will appear where there is an option to **Co-Sign**, **Print** or **Close**.

After **Co-Sign** is selected, a confirmation box will appear. Enter the signature and signature date (auto-generates today's date) and select either **Co-Sign** or **Co-Sign and Approve** based on permissions and organization policy. If **Co-Sign** only is selected, the order will flow to the QA Center for approval. If **Co-Sign and Approve** is Selected, the order bypasses the QA center and gets approved.

ORDERS TO BE SENT

View/Orders Management/Orders to Be Sent

Once orders are approved, the Orders to Be Sent screen will populate the items ready to be sent to the physician either manually (fax, mail, deliver) or electronically through the Axxess (or physician) portal. Within the Order Sent screen, sort and filter by the below items:

- Branch **-** Filter by location/branch (if more than one).
- Date Range **-** Defaults to last 60 days from the current date. The date range may be changed. To refresh the orders displaying, select **Generate**.
- Delivery Method **-** Defaults to All. Choose between Axxess Portal, Fax and Mail.
- Status **-** Defaults to Active and Discharged (Non-Admission available). Select/multi-select applicable patient statuses.
- Search **-** Allows the user to search the table by any data listed – order number, patient, type, etc.
- Export to Excel **-** This function allows the generated list to be exported to Excel for further analysis.

Send Orders Electronically

Check the boxes to the left of the orders with a delivery method of Axxess Portal and select the **Send** button in the top right to mark orders as sent. A confirmation will appear in the top right-hand corner of the screen, confirming the orders were sent successfully. At this time, physicians who were set up to sign orders electronically will be able to access the Physician Portal to sign their orders (moved to the Orders Pending Signature sub-menu). The order is also updated to a **Sent to Physician (Electronically)** status in the patient chart.

Send Orders Manually

Physicians who have not agreed to receive their orders electronically must filter for the Delivery Method of Mail or Fax. To view the order in PDF format, select the printer icon. From this window, the order can be printed. Once printed, check orders to send manually on the left and select the button in the top right to **Send**. Once marked as sent, the orders move to the Orders Pending Signature sub-menu. The order is also updated to **Sent to Physician (Manually)** status in the patient chart.

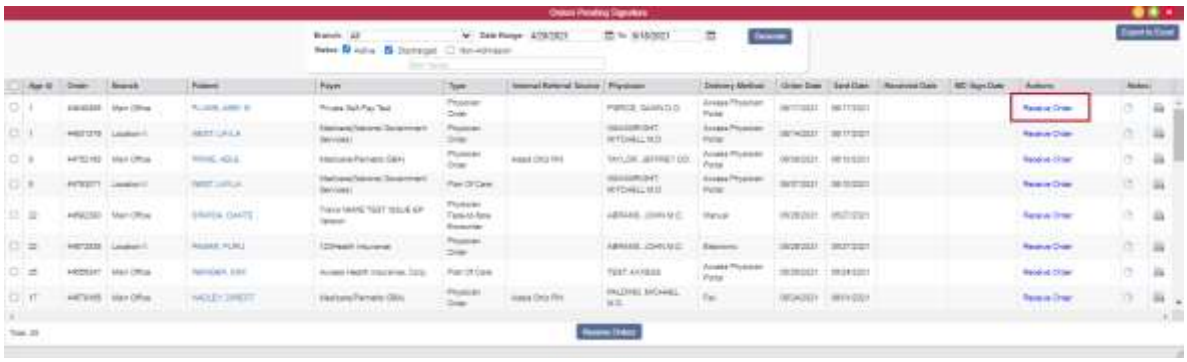
ORDERS PENDING MD SIGNATURE

View/Orders Management/Orders Pending MD Signature

To track outstanding orders previously sent to the physician or to mark an order as received and/or signed, access Orders Pending MD Signature. Within the Orders Pending MD Signature screen, sort and filter by the below items:

- Branch **-** Filter by location/branch (if more than one).
- Date Range **-** Defaults to last 60 days from the current date. The date range may be changed. To refresh the orders displaying select **Generate**.
- Status **-** Defaults to Active and Discharged (Non-Admission available). Select/multi-select applicable patient status.
- Search **-** Allows the user to search the table by any data listed – order number, patient, type, etc.
- Export to Excel **-** This function allows the generated list to be exported to excel for further analysis.

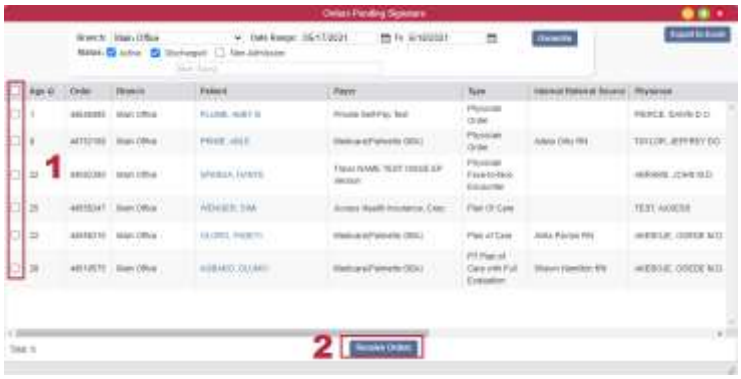
There are currently two ways to mark an order as received with signature. Individual orders can be marked Received by locating the order that has been returned signed by the physician. Once found, select the **Receive Order** action button in the far right-hand column.



The Received Date (auto-generates today's date) and MD Sign Date will now be open to fill out with the appropriate dates. Then select the **Update** hyperlink.

Order Date	Sent Date	Received Date	MD Sign Date	Actions
06/17/2021	06/17/2021	06/18/2021		Update | Cancel

Select multiple orders at one time to mark as received. Choose the applicable orders on the far left-hand side and select **Receive Orders** at the bottom of the screen.



A pop-up will display to confirm the Received Date and Physician Signature Date (auto-generates todays date) and then select the **Mark as Received** button.

Once an order is marked as Received, it moves to the Order History screen. The order will also be updated in the patient chart to indicate “Returned W/Physician Signature”.

Physician Order	06/17/2020	Sherilyn Smith RN	Returned W/ Physician Signature

ORDERS HISTORY

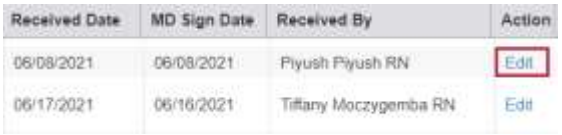
View/Orders Management/Orders History

Shows a complete list of received and outstanding orders. Within the Orders History screen, sort and filter by the below items:

- Branch - Filter by location/branch (if more than one).
- Date Range - Defaults to last 60 days from the current date. The date range may be changed. To refresh the orders displaying select **Generate**.
- Status - Defaults to Active and Discharged (Non-Admission available). Select/multi-select applicable patient status.
- Export to Excel - This function allows the generated list to be exported to Excel for further analysis.

If the order Sent Date, Received Date or Physician Signature Date were entered incorrectly, corrections can be made by selecting the **Edit** hyperlink in the Action column. Upon selection, a pop-up window appears, allowing updates to one or all

the dates. Selecting **Update** will save the changes and **Exit** will discard any changes to the record.



Received Date	MD Sign Date	Received By	Action
06/08/2021	06/08/2021	Piyush Piyush RN	Edit
06/17/2021	06/16/2021	Tiffany Moczygemba RN	Edit

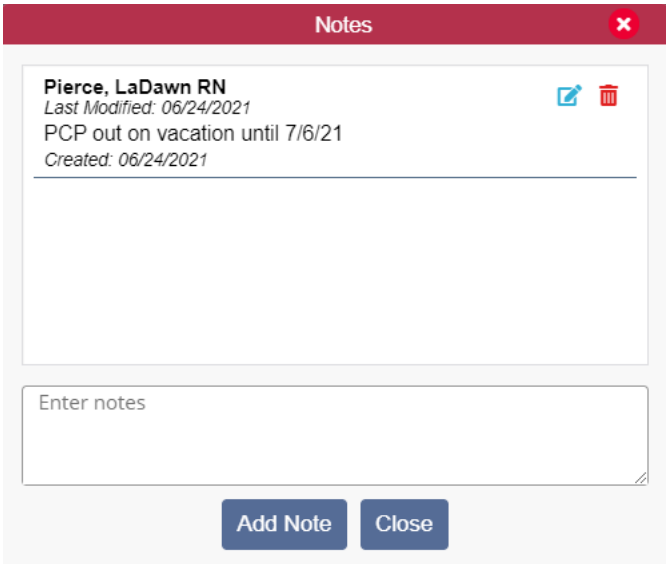
ORDERS MANAGEMENT NOTES

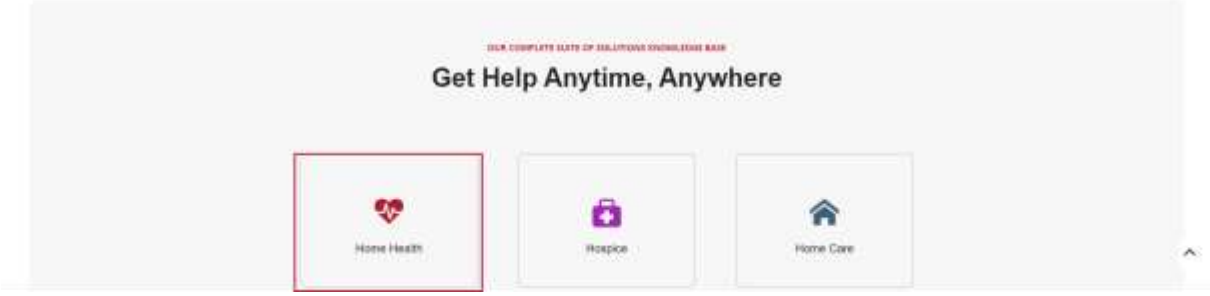
To view or enter order notes, navigate to the View tab and hover over Orders management. Select Orders to Be Sent, Orders Pending MD Signature, or Orders History. A new Notes column appears on each of these screens.

Click on the note icon in the **Notes** column to enter notes for the corresponding order. The note icon turns blue once a note has been entered.

Hover over the blue note icon to view the notes entered. Up to three notes can be viewed when hovering over the icon. To view additional notes, click on the note icon.

To enter a new note, type in the text box and click Add Note. To edit a note, click on the edit icon. To delete a note, click the delete icon. Users must have permission to delete notes.



HELP

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