

HOME HEALTH ORDERS MANAGEMENT OVERVIEW MANUAL

July 2021

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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.



Physician Order Co-Signature

Order Number: 43984063

Patient Name: JIMENEZ, ANGELO

Created Date: 04/05/2021

Clinician Co-Signature:

Clinician Co-Signature Date: 04/05/2021 

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.



Orders To Be Sent

Branch: All Filter by: All

Date Range: 4/20/2021 To 6/16/2021 

Status: ☒ Active ☒ Discharged ☐ Non-Admission

Search Term:

Order	Branch	Patient	Type	Physician	Delivery Method	Order Date	Notes
<input type="checkbox"/> 44833218	Location B	ZACHRA, KRYSTAL	Physician Order	ABRAMS, JOHN M D	Electronic	06/17/2021	
<input type="checkbox"/> 44847489	Main Office	FLURBS, ABBY B	Physician Order	PERCE, DAWN D D	Axxess Physician Portal	06/17/2021	

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.



Order	Branch	Patient	Type	Physician	Delivery Method	Order Date	Notes
<input checked="" type="checkbox"/> 44853010	Location B	ZAMORA, KRISTAL	Physician Order	ASPRAMS, JOHN M.D.	Electronic	06/17/2021	
<input type="checkbox"/> 44847499	Main Office	PLUMB, ABBY R	Physician Order	PERCE, DAWN D.O.	Axxess Physician Portal	06/17/2021	

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.

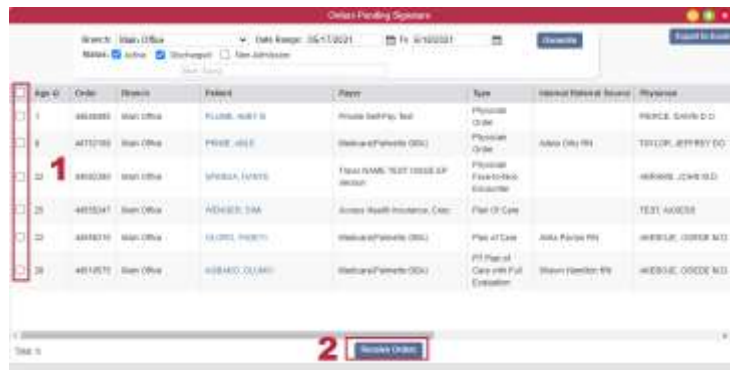


Age	Order	Branch	Physician	Physician	Type	Internal Referral	Referral	Physician	Delivery Method	Order Date	Sent Date	Received Date	MD Sign Date	Actions
1	4480000	Man (Off)	FLORIAN, ANDRÉ S	Private Self-Pay Test	Physician Order			PRINCE, SARA D D	Axxess Physician Portal	06/17/2021	06/17/2021			Receive Order
1	4480010	Location	ABOTT, LARA L	Medicare/Medicaid/Supplemental	Physician Order			ABOTT, LARA L	Axxess Physician Portal	06/17/2021	06/17/2021			Receive Order
8	4480010	Man (Off)	WHEELER, KYLE	Medicare/Medicaid (Self)	Physician Order	Asst (Self) PH		WHEELER, KYLE M D	Axxess Physician Portal	06/18/2021	06/18/2021			Receive Order
8	4480010	Location	WHEELER, KYLE	Medicare/Medicaid/Supplemental	Physician Order	Asst (Self) PH		WHEELER, KYLE M D	Axxess Physician Portal	06/17/2021	06/17/2021			Receive Order
12	4480010	Man (Off)	WHEELER, KYLE	Private Self-Pay Test	Physician Order			WHEELER, KYLE M D	Axxess Physician Portal	06/18/2021	06/18/2021			Receive Order
12	4480010	Location	WHEELER, KYLE	Medicare/Medicaid/Supplemental	Physician Order			WHEELER, KYLE M D	Axxess Physician Portal	06/18/2021	06/18/2021			Receive Order
17	4480010	Man (Off)	WHEELER, KYLE	Private Self-Pay Test	Physician Order			WHEELER, KYLE M D	Axxess Physician Portal	06/18/2021	06/18/2021			Receive Order

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.



Age	Order	Branch	Physician	Physician	Type	Internal Referral	Referral	Physician
1	4480000	Man (Off)	FLORIAN, ANDRÉ S	Private Self-Pay Test	Physician Order			PRINCE, SARA D D
8	4480010	Man (Off)	WHEELER, KYLE	Medicare/Medicaid (Self)	Physician Order	Asst (Self) PH		WHEELER, KYLE M D
12	4480010	Man (Off)	WHEELER, KYLE	Private Self-Pay Test	Physician Order			WHEELER, KYLE M D
12	4480010	Man (Off)	WHEELER, KYLE	Medicare/Medicaid/Supplemental	Physician Order			WHEELER, KYLE M D
17	4480010	Man (Off)	WHEELER, KYLE	Private Self-Pay Test	Physician Order			WHEELER, KYLE M D

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

 Are you sure you want to mark the selected orders as received? This will override the existing received and signature dates.

Received Date: 06/18/2021 

Physician Signature Date: 06/18/2021 

[Mark as Received](#) [Cancel](#)

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
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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.

Order History

Branch: All Date Range: 4/20/2021 To 6/18/2021 Generate

Status: ☒ Active ☒ Discharged ☐ Non-Admission

Export to Excel

Order	Patient	Type	Physician	Delivery Method	Order Date	Sent Date	Received Date
44763071	WEST, LAYLA	Plan Of Care	WAINWRIGHT, MITCHELL M.D.	Axxess Physician Portal	05/07/2021	05/10/2021	
44738493	AARON, BOB	Physician Face-to-face Encounter	GRANT, ALLEN M.D.	Manual	05/04/2021	05/08/2021	05/08/2021
44681375	HIRPARA, KATY M.	Physician Order	HIRPARA, DIVYESH M.D.	Axxess Physician Portal	05/03/2021	05/03/2021	05/03/2021
44685726	SMITH, SAMANTHA	Physician Face-to-face Encounter	SMITH, ALLISON MD	Manual	05/03/2021		
44665064	KIM, SEOKJUN	Plan Of Care	KRABS, EUGENE		05/01/2021	05/02/2021	05/08/2021
44666657	MOCZY, TIFF M.	Physician Order	MOCZY, TIFFANY R. NP	Axxess Physician Portal	05/30/2021	05/17/2021	05/17/2021

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

Update Physician Order

Sent Date:

06/18/2021

Received Date:

6/18/2021

Physician Signature Date:

6/18/2021

Update

Exit

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.

Order History

Branch: All

Date Range: 6/3/2021 To 6/30/2021

Download



Export to Excel

Status: Active Discharged Non-Available

Order	Patient	Type	Physician	Delivery Method	Order Date	Sent Date	Received Date	MD Sign Date	Received By	Action	Notes
44347430	FLUSS, ABBY B	Physician Order	PIERCE, DAWN D O	AXXESS Physician Portal	06/17/2021	06/14/2021	06/14/2021	06/14/2021		Edit	
44348035	FLUSS, ABBY B	Physician Order	PIERCE, DAWN D O	AXXESS Physician Portal	06/17/2021	06/17/2021	06/16/2021	06/16/2021		Edit	

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.

Order	Patient	Type	Physician	Delivery Method	Order Date	Sent Date	Received Date	MD Sign Date	Received By	Action	Notes
44348432	ABRICE, KYLE	Physician Face-to-Side Encounter	WAGST, ALLEN MD	Manual	06/04/2021	06/03/2021	06/03/2021	06/03/2021		Edit	
44349275	WERNER, KATY H	Physician Order	WERNER, CHRISTIAN MD	AXXESS Physician Portal	06/03/2021	06/03/2021	06/03/2021	06/03/2021	See Cathy RN	Edit	
44349387	TESTTT, ANJAN	Physician Order	JOHN, ABRAMS	AXXESS Physician Portal	06/03/2021	06/04/2021	06/04/2021	06/04/2021		Edit	
44349736	SMITH, SARAHANNA	Physician Face-to-Side Encounter	SMITH, ALISON MD	Manual	06/03/2021					Edit	
44349833	TESTTT, ANJAN	Physician Order	JOHN, ABRAMS	AXXESS Physician Portal	06/03/2021	06/04/2021	06/04/2021	06/04/2021		Edit	

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.

Notes

Pierce, LaDawn RN

Last Modified: 06/24/2021

PCP out on vacation until 7/6/21

Created: 06/24/2021

Enter notes

Add Note

Close

HELP

A great resource available any time, any day is our Help Center. Get answers to frequently asked questions and watch tutorial videos on all our Axxess products. Our Help Center can be accessed by going to *Help/Help Center* or <https://www.axxess.com/help/>

