

# HOSPICE CLINICIAN TRAINING MANUAL

November 2020

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## LOGGING IN

Go to [www.axxess.com](http://www.axxess.com) and select **LOGIN**, located in the upper, right-hand corner.



Enter the username and password then select **Secure Login**.

The image shows the Axxess login form. It features the Axxess logo at the top. Below the logo are two input fields: 'Email address' and 'Password'. There is a checkbox labeled 'Remember Me' and a link 'Forgot your Password?'. A red button labeled 'Secure Login' is at the bottom. At the very bottom, there is a small copyright notice: 'Axxess | Copyright © 2008 - 2018 | All Rights Reserved | Dallas, Texas'.

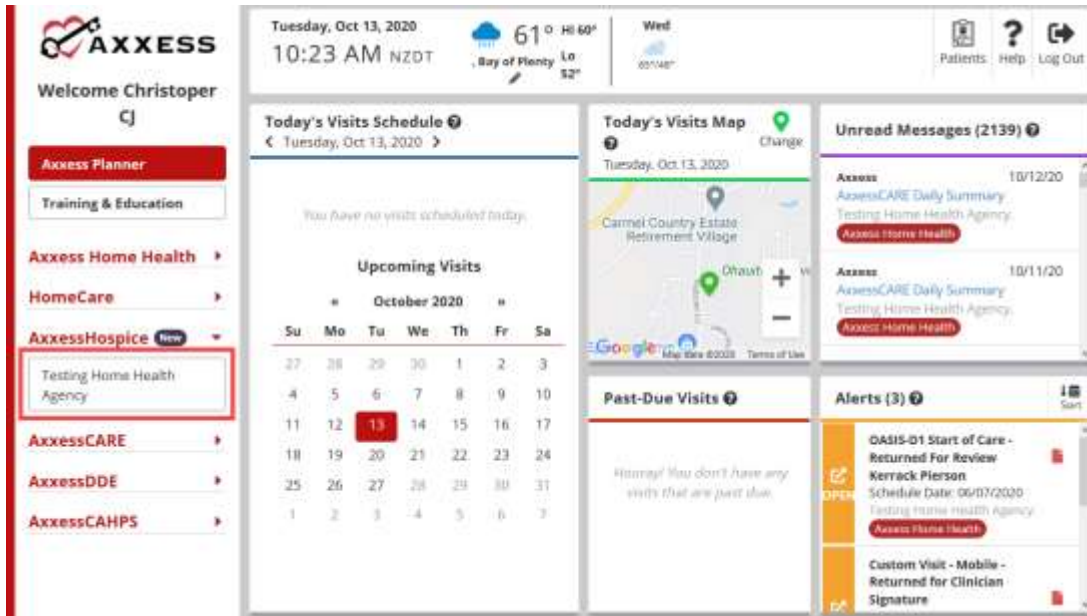
The username is the email address assigned to the user's account when it was created. The password was created by the user from a link that was sent to this email address. This password will also be the user's electronic signature.

If the user forgets their password, select the **Forgot your Password** hyperlink, and a link will be sent to this email address. Here the user can reset their password, however, the electronic signature will remain the same. After the correct username and password are entered, the following message will display:

The image shows a 'Login Successful' message box. It features the Axxess logo at the top. Below the logo, the text reads: 'Login Successful'. A paragraph of legal disclaimer text follows: 'This system and all its components and contents (collectively, the "System") are intended for authorized business use only. All data within is considered confidential and proprietary. Unauthorized access, use, modification, destruction, disclosure or copy of this system is prohibited and will result in prosecution. Click OK to continue.' At the bottom are two buttons: 'Cancel' and 'OK'. At the very bottom, there is a small copyright notice: 'Axxess | Copyright © 2008 - 2018 | All Rights Reserved | Dallas, Texas'.

Select **OK** and the user will see the Axxess Planner.

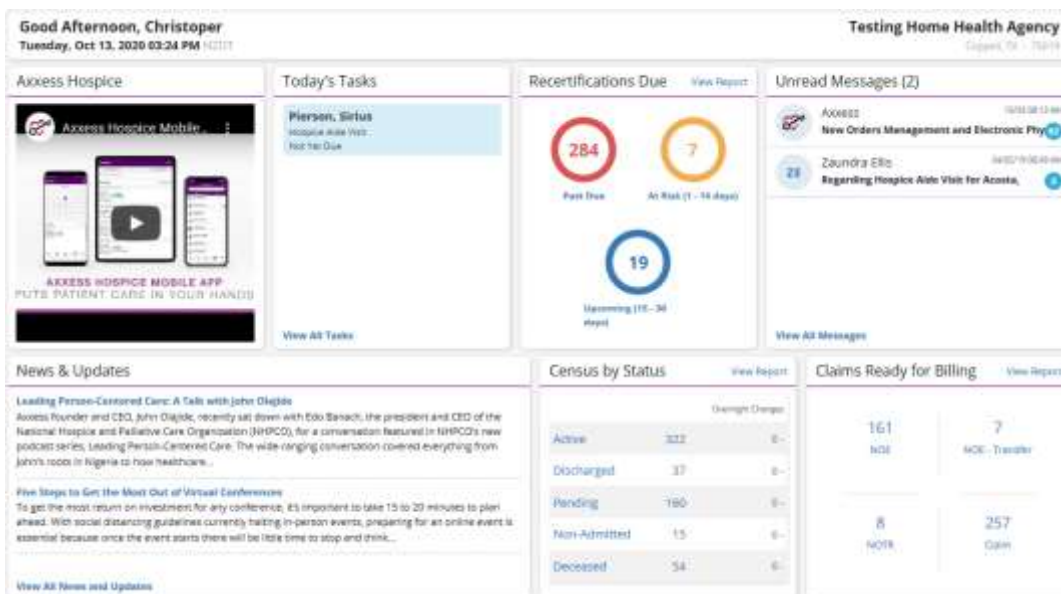
## AXXESS PLANNER



On the left-hand side of the screen is a list of organizations that the user works with, as well all the products to which their organization is subscribed, select the organization listed under AxxessHospice to move forward.

## DASHBOARD

The **Dashboard** opens upon log in. Below are the eight tiles will appear:



Status	Count	Change
Active	322	0
Discharged	37	0
Pending	180	0
Non-Admitted	15	0
Deceased	54	0

Category	Count
Not	161
AOE - Transfer	7
Not	8
Claim	257

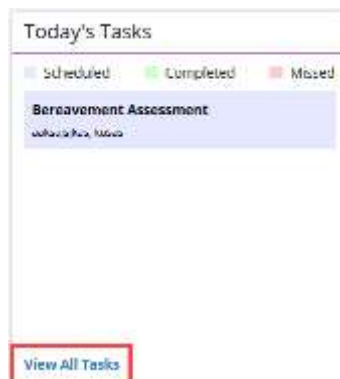
1. Welcome Panel - Displays the user's name, date, name and location of organization.
2. Video - Built-in educational videos uploaded by Axxess.
3. Today's Tasks - Displays the user's daily scheduled tasks. This list is sorted by day and visits distinguished by Scheduled (blue), Completed (green) and Missed (red). There is a hyperlink to **View All Tasks**.
4. Recertifications Due - Shows a visual representation of Recertifications that are Past Due, At Risk and Upcoming. Selecting a circle will take the user to a list of those patients.
5. Unread Messages - This tile shows all unread messages. Users are linked to the messages that are showing and a hyperlink to **View All Messages**, which takes the user to the Message Center.
6. News & Updates - This shows links to Axxess-generated blog posts, educational articles, regulatory updates and other important information.
7. Census by Status - Shows the current active census by status and changes overnight. Selecting the status number will take the user to a list of patients filtered for that status.

**NOTE:** Focus for clinician should be on Active, Discharge, Deceased, and Admission changes.

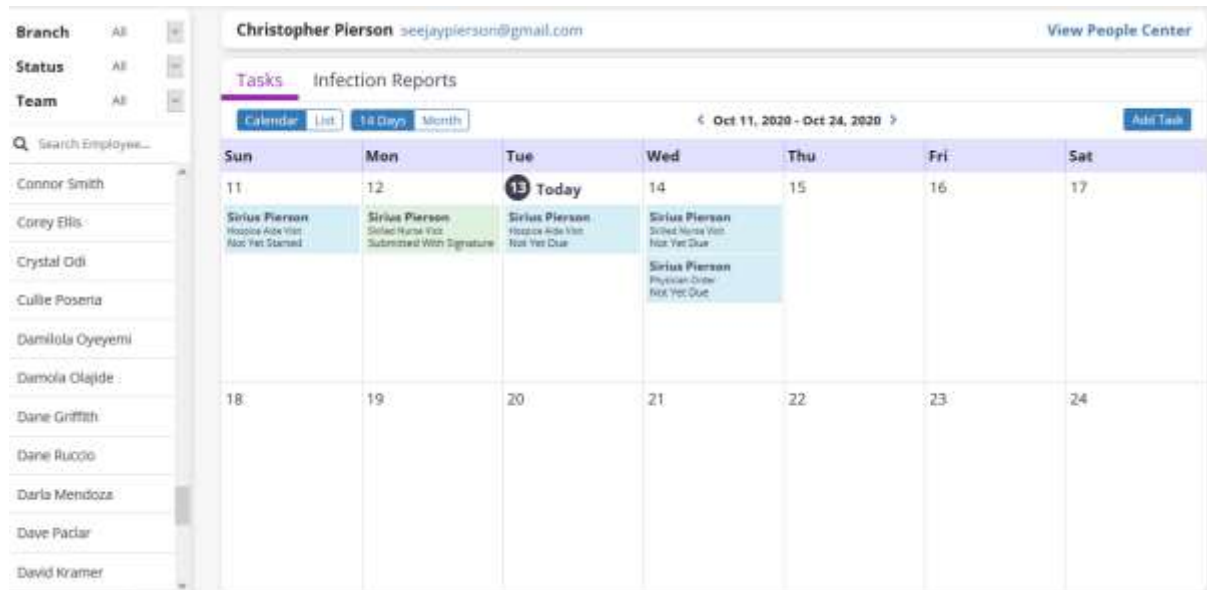
8. Claims Ready for Billing - Shows claims that are ready but not yet sent. Selecting the type of claim will take the user to a list of the claims ready for billing of that type.

## Today's Tasks

Select the **View All Tasks** hyperlink in the bottom left corner of the tile to view the entire list of scheduled tasks.



The top of the page will show the user's name and email address tied to account and a hyperlink to **View Employee Center**. The top left of the page allows for the filtering of employees. Filter by Search for a specific employee, Branch, Status and/or Team to narrow results. Users can also scroll down the list of Employees.



The default view for the Employee Schedule is 14 days. The calendar can be viewed as 14 days or by month. Toggle through Days and Months by selecting the < or > arrow with the date being shown in between them. Select the **Add Task** button to add a task. View the list of missed visits in the Schedule by selecting the **List** view tab. The **List** view has a tab to view tasks by Benefit Period.

Visits are distinguished by the following colors:

Scheduled
  Completed
  Missed

## Infection Reports

The **Infection Reports** tab of the Employee Schedule has the same navigation functionality as the **Tasks** tab, except instead of adding tasks, users can add infection reports.



Select the **Add Infection Report** button in the top right corner of the screen. Complete the required fields and select **Save Report**, **Save & Open Report**, **Save & Add Another**, or **Cancel**. These can also be added during assessments and in the list menu under **Infection Log**.

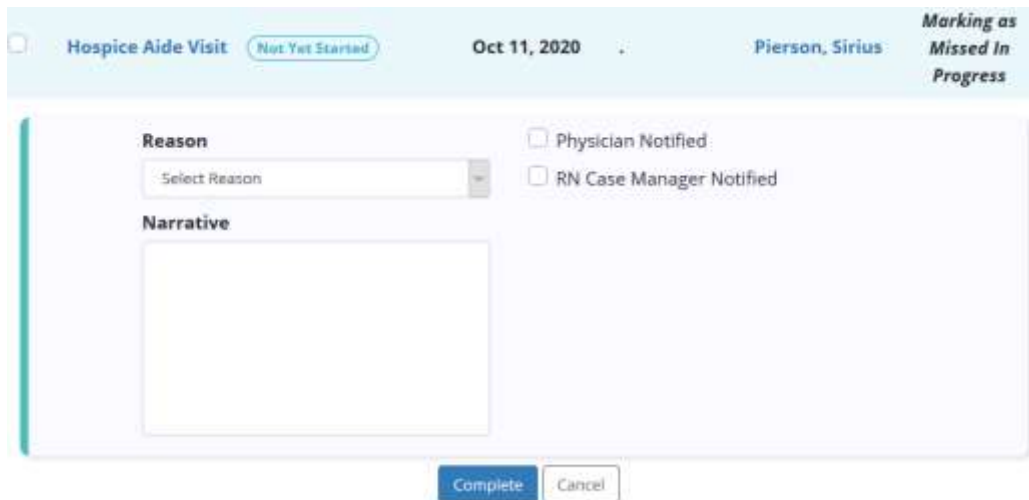


## Missed Visit

Mark visits as missed in the Patient Schedule if they are scheduled either prior to or on the current date. Select the red sticky note icon.



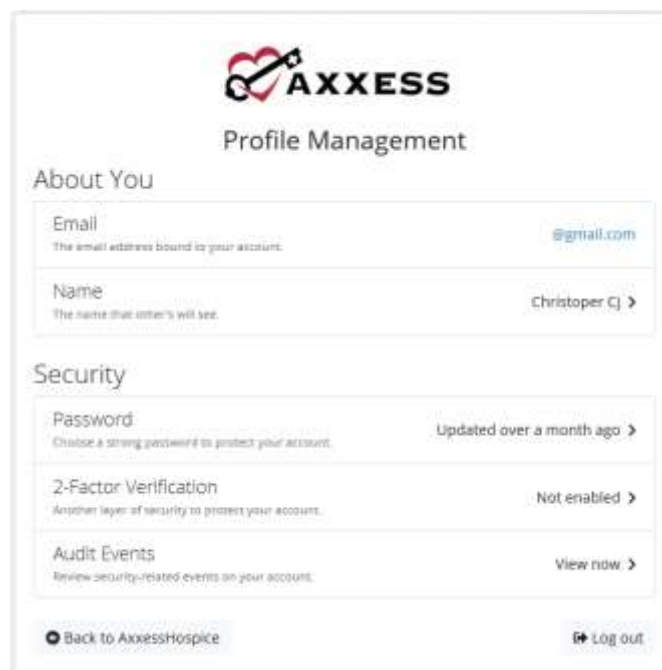
Choose a Reason why the visit is being missed. Select whether Physician and/or RN Case Manager was notified. When selected, find Physician and/or RN Case Manager by typing their name in the search field. Then write in the free text Narrative details about the missed visit. Then select the **Complete** button at the bottom.



The clinician will then electronically sign the document by selecting the checkbox then select the **Complete** button.

## EDIT PROFILE

*\*User Name\*/Profile*



While managing their profile, users can:

- Change the name that other users will see

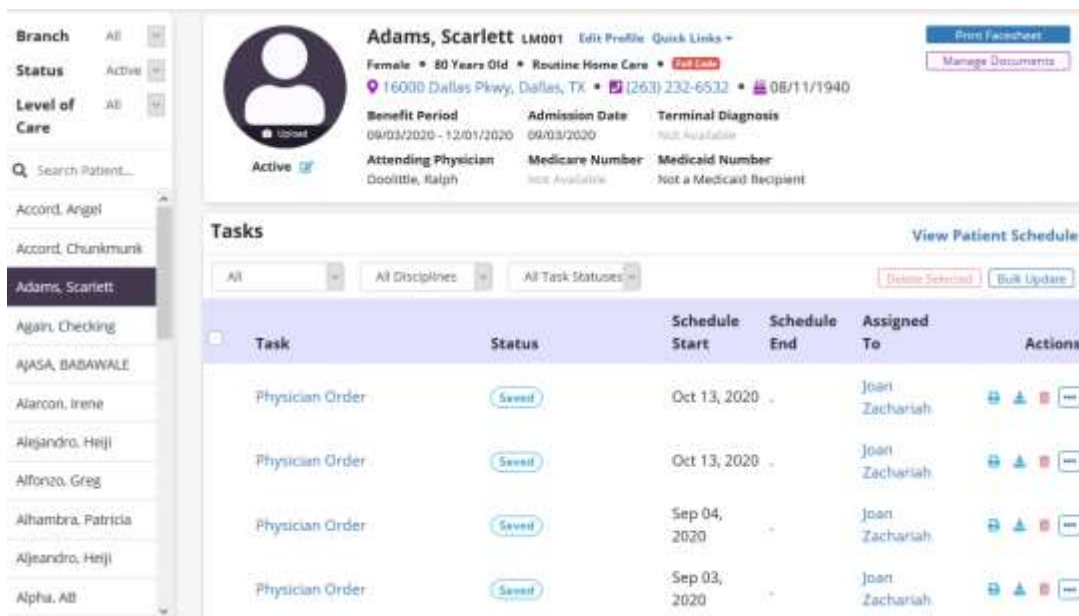


- Change their password
- Enable a 2-Factor Verification for more security
- Review Audit Events

The user can then choose to go **Back to AxxessHospice** or **Log out**.

## PATIENT CHARTS

### *Patients/Patient Charts*



The screenshot displays the Axxess Patient Charts interface. On the left is a sidebar with filters for Branch, Status, and Level of Care, along with a search bar and a list of patients. The main area shows the patient profile for Adams, Scarlett, including demographics, contact information, and medical history. Below the profile is a 'Tasks' section with a table of scheduled tasks.

Task	Status	Schedule Start	Schedule End	Assigned To	Actions
Physician Order	Saved	Oct 13, 2020	-	Joan Zachariah	[Icons]
Physician Order	Saved	Oct 13, 2020	-	Joan Zachariah	[Icons]
Physician Order	Saved	Sep 04, 2020	-	Joan Zachariah	[Icons]
Physician Order	Saved	Sep 03, 2020	-	Joan Zachariah	[Icons]

Filter by:

- Branch - Choose the branch (if more than one).
- Status - Choose from Active, Discharge, Pending, Non-Admit, Deceased.
- Level of Care - Choose from Routine, Respite, Continuous Care or General Inpatient.
- Patient Search - Start typing a name and the list narrows down to match.

The patient's snapshot at the top of the screen gives a quick view of the patient's demographics. There are hyperlinks to the patient's address and phone number. Select **Edit Profile** to view the patient's full Demographics, Payer Information, Clinical Information, Physician(s), Pharmacy and DME, Authorized Contacts, Emergency Preparedness, Advance Directives and Referral Information.



**Adams, Scarlett** LM001 [Edit Profile](#) [Quick Links](#)

Female • 80 Years Old • Routine Home Care • [Add Code](#)

16000 Dallas Pkwy, Dallas, TX • (263) 232-6532 • 08/11/1940

Benefit Period: 09/03/2020 - 12/01/2020  
Admission Date: 09/03/2020  
Terminal Diagnosis: Not Available

Attending Physician: Doolittle, Ralph  
Medicare Number: Not Available  
Medicaid Number: Not a Medicaid Recipient

Active ☒

[Print Facesheet](#)

[Manage Documents](#)

### Edit Patient - Adams, Scarlett

Demographics

Payer Information

Clinical Information

Physician(s)

Pharmacy and DME

Authorized Contacts

Emergency Preparedness

Advance Directives

Referral Information

**Demographic Information**

**Patient Information**

Patient ID/MR Number \*  
LM001 Lost Patient ID/MR Number Used: JG8711890

[Add](#) First Name \* [Add](#) M.I. [Add](#) Last Name \* [Add](#) Suffix  
Scarlett Enter M.I. Adams Enter Suffix

[Add](#) Date of Birth \* [Add](#) Gender \* [Add](#) Social Security Number [Add](#) Veteran  
08/11/1940 Female Enter SSN ☐ Select Options

Primary Phone Number \* [Add](#) Alternate Phone Number [Add](#) Email  
1 (263) 232-6532 Enter Phone Number Enter Email

Agency Branch \* [Add](#) Marital Status [Add](#) Race/Ethnicity  
United States Select Marital Status Select Ethnicity

**Patient Primary Address**

Facility Name [Add](#) Country \*  
Start Typing... United States of America

[Add Facility](#)

[Cancel](#) [Next](#) [Save](#)

There is a button to **Print Facesheet** and a button to **Manage Documents**, which is for patient attachments. There is also a hyperlink to quickly jump to **View Patient Schedule**. A list of visits/tasks in the current episode will display at the bottom of the screen. Filter the Benefit Period, Discipline and Task Status drop-down menus to change viewing parameters.

All

All Disciplines

All Task Statuses

## QUICK LINKS

Quick Links

[Medication](#)

[Allergy](#)

[Plan of Care](#)

[Diagnosis](#)

[Frequency](#)

[Infectious Disease](#)

[Non-Covered Items](#)

## Medication

**Alfonzo, Greg JH45885** [Quick Links +](#) [Print Facesheet](#)

Male • 1 Years Old • No Level of Care Selected • [Full Code](#)

Active • 4545 Spring Valley Road, Farmers Branch, TX • (151) 515-6456 • 10/07/2018 • [Show Details](#)

**Drug Interactions Result** on All Active Medications

Major Drug Interaction 1 • Moderate Drug Interaction 5 • Minor Drug Interaction 3

[Medication Profile](#) [Detailed Drug Interaction Report](#) [Orders](#) [Signed Medication Profile](#)

[Print Medication Profile](#) [Check Active Drugs Interaction](#) [Sign Medication Profile](#) [Update Medications](#)

Medication Name Dosage/Route/Frequency	Indication	Start Date Discontinue Date	Added Physician Discontinued Physician	Administered By	Actions
<b>Active Medications (6)</b> <a href="#">Hide All</a>					
<a href="#">Default</a> Coumadin 15 • Po • Daily <a href="#">Rx History</a>	Test	Mar 31, 2019		Caregiver	<a href="#">Edit</a>
<a href="#">Default</a> Apomorphine 14 • Po • Daily <a href="#">Rx History</a>	Test	Feb 24, 2019		Caregiver	<a href="#">Edit</a>
<a href="#">Default</a> Childrens Ibuprofen 15 • Po • Daily <a href="#">Rx History</a>	Test	Jan 27, 2019		Caregiver	<a href="#">Edit</a>

**Add a Medication** - Select the **Update Medications** button and then select the **Create Physician Order** button unless there are other orders to associate.

[Medication Profile](#) [Detailed Drug Interaction Report](#) [Orders](#) [Signed Medication Profile](#)

There are no open Physician Orders assigned to you. Please create one.

[Create Physician Order](#) [Cancel](#)

[Print Medication Profile](#) [Check Active Drugs Interaction](#) [Sign Medication Profile](#)

New Physician Order date will be auto-generated to the date it was created. Find physician tied to order and select the **Create** button.

**New Physician Order**

Date: 10/14/2020

Physician: AGARWAL, ASHWANI

[Create](#) [Cancel](#)

Select the **Add Medication** button once the new physician order is created.

[Medication Profile](#)
[Detailed Drug Interaction Report](#)
[Orders](#)
[Signed Medication Profile](#)

Updates will be added to **ASHWANI AGARWAL**, Order scheduled on 10/14/2020.
 [View Order](#)
[Change Order](#)
[Done](#)

[Print Medication Profile](#)
[Check Active Drugs Interaction](#)
[Discontinue Selected](#)
[Add Medication](#)

Fill in the following **Add Medication** window:

**Add Medication**

**Medication Name \***  
 Type to Search Medication...

**Start Date \*** MM/DD/YY 
**Discontinue Date** MM/DD/YY

**Classification**  
 Select Classification

**Indication \***  
 Enter Indication

**Dosage \*** Enter 
**Route \*** Enter Ro 
**Frequency \*** Enter Freque

**Administered by \***  
☐ Facility ☐ Caregiver ☐ Patient  
☐ Hospice

**Physician**  
 ASHWANI, AGARWAL

**Covered by**  
☐ Hospice

[Save Medication](#)
[Save & Add Another](#)
[Cancel](#)

- Medication name - Begin typing the description of the medication, a drop-down box will appear with all the medications listed in the software. Medications not listed can be added. However, only medications selected from the drop-down box will be checked for drug interactions.
- Classification - If a medication from the database is entered, this area will give suggested classifications.
- Dosage, Route & Frequency - Enter medication details.
- Start Date - Enter or select calendar icon to choose date.
- Discontinue Date - Enter if applicable.
- Indication - Enter the reason why medication is being taken.
- Administered by - Select one or more checkboxes from Facility, Caregiver, Patient and/or Hospice.
- Covered by Hospice - Indicate whether medication will be covered by organization by selecting checkbox.

The following alert will appear in Medications, select the **View Order** button.

You have **1 Physician Order** to sign and complete.
 [View Order](#)

Select the View Order hyperlink.

**You have 1 Physician Order to sign and complete.**

**Physician order requires signature**

Task Name	Status	Start Date	Assigned to	Physician	Total Drugs	View Order
Physician Order	<a href="#">Saved</a>	Oct 14, 2020	Christopher Cj	Agarwal, Ashwani	1	<a href="#">View Order</a>

Lasix 20 Mg Oral Tablet

[Action](#)

Fill in the order Time, enter the Summary/Title and Order Details, indicate whether Order Read Back and Verified, then select the **Complete** button.

**Order Information**

Physician \*  
ASHWANI AGARWAL

Order Date \*  
10/14/2020

Effective Date \*  
10/14/2020

Time \*  
Enter Time

Copy To (Optional)  
Enter Additional Recipient Name

**Summary/Title**  
Enter Summary/Title

**Order Types**

Medication Plan of Care Frequency Level of Care Diagnosis Supplies DME Activity Diet Other

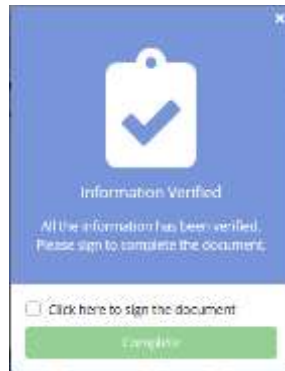
**Medication Updates**  
New Medications:  
Lasix 20 mg oral tablet, 20mg Daily PO, Blood pressure. Start 10/14/2020. Caregiver: Covered by Hoggins

**Order Details**

☐ Order Read Back and Verified

[Cancel](#) [Save](#) [Complete](#)

A pop-up window appears asking for the user's electronic signature. Select the checkbox and then select the **Complete** button.



A confirmation pop-up will appear saying, “Success! You have successfully completed the note.” Choose to Close or **Go to Patient Chart**.

**Discontinue a Medication** - Discontinue medications by following the previously shown order creation process. Select the checkbox next to the medication to discontinue, then select the **Update Medications** button, then select the **Create Physician Order** button.

Users then must choose the physician order tied to the medication by selecting the green **Select Order** button. A button will then appear, allowing to **Discontinue Selected**. Confirm the Discontinue Date (auto generates to today’s date) and select the **Discontinue Medications** button.

*Updates will be added to ashwani agarwal Order scheduled on 05/21/2020.*
[View Order](#)
[Change Order](#)
[Done](#)

**Discontinue Date \***

**Discontinued Physician**  
 agarwal, ashwani

[Discontinue Medications](#)
[Cancel](#)

A disappearing green pop-up window will confirm the medication has been discontinued, and the medication will now be listed in the Discontinued Medications section of the Medication Profile. The discontinue order will also need to be signed and completed.

**Interactions** - Drug interactions will be automatically checked with each new medication order. They also can be run manually by selecting the **Check Active Drugs Interaction** button.

To view drug interactions, select the **Detailed Drug Interaction Report** tab.



**Drug Interactions Result** on All Active Medications

Major Drug Interaction 1 Moderate Drug Interaction 2

Medication Profile Detailed Drug Interaction Report Orders Signed Medication Profile

All Drug Interactions 0 Major Drug Interaction 1 Moderate Drug Interaction 2 Print

**1 ALPRAZolam 0.25 Mg Oral Tablet** Major Drug Interaction  
**Acetaminophen-hydrocodone**

**ALPRAZolam & Acetaminophen-hydrocodone**

GENERALLY AVOID: Concomitant use of opioids with benzodiazepines or other central nervous system (CNS) depressants (e.g., nonbenzodiazepine sedatives/hypnotics, anxiolytics, muscle relaxants, general anesthetics, antipsychotics, other opioids, alcohol) may result in profound sedation, respiratory depression, coma, and death. The risk of hypotension may also be increased with some CNS depressants (e.g., alcohol, benzodiazepines, phenothiazines). MANAGEMENT: The use of opioids in conjunction with benzodiazepines or other CNS depressants should generally be avoided unless alternative treatment options are inadequate. If coadministration is necessary, the dosage and duration of each drug should be limited to the minimum required to achieve desired clinical effect. Patients should be monitored closely for signs and symptoms of respiratory depression and sedation, and advised to avoid driving or operating hazardous machinery until they know how these medications affect them. Cough medications containing opioids (e.g., codeine, hydrocodone) should not be prescribed to patients using benzodiazepines or other CNS depressants including alcohol. For patients who have been receiving extended therapy with both an opioid and a benzodiazepine and require discontinuation of either medication, a gradual tapering of dose is advised, since abrupt withdrawal may lead to withdrawal symptoms. Severe cases of benzodiazepine withdrawal, primarily in patients who have received excessive doses over a prolonged period, may result in numbness and tingling of extremities, hypersensitivity to light and noise, hallucinations, and epileptic seizures.

**2 Advil 200 Mg Oral Tablet** Moderate Drug Interaction  
**Amlodipine/hydrochlorothiazide/olmesartan 5 Mg-12.5 Mg-20 Mg Oral Tablet**

**Ibuprofen & Amlodipine/hydrochlorothiazide/olmesartan**

MONITOR: Concomitant use of nonsteroidal anti-inflammatory drugs (NSAIDs) and diuretics may adversely affect renal function due to NSAID

Drug interactions will be listed out one by one. Choose to view All or just Major or Moderate by selecting either tab at the top of the list. The whole report can be downloaded/printed as a PDF file by selecting the **Print** button in the top right.

**Medication Profile** - Select the **Print Medication Profile** button to view and/or save the PDF version of the medication profile. Below is a printed medication profile.

<b>Agency Information</b> Tending Home Health Agency, Inc. Dallas Parkway 16000, 1717 E Belt Line Road Coppell, TX 75019 866-666-6666 (Office), 866-666-6666 (Fax) Provider Number: 1234567899			<b>MEDICATION PROFILE</b>			
<b>Patient Name: Alfonso, Greg</b>						
<b>Patient Information</b>						
<b>Date of Birth:</b> 10/07/2018		<b>MRN:</b> JH45885		<b>Benefit Period:</b> 04/24/2020 - 06/22/2020		
<b>Attending Physician:</b> JONES, ZALINDRA		<b>Primary Diagnosis:</b> Other rupture of muscle (nontraumatic), left shoulder		<b>Comorbidities:</b> Disorders of muscle in diseases classed elsewhere, left shoulder		
<b>Active Medication(s)</b>						
<b>Start Date</b>	<b>Medication</b>	<b>Classification</b>	<b>Indication</b>	<b>Through Date</b>	<b>Covered By Hospice</b>	<b>Administered By</b>
02/04/2019	apocorphone 14 daily po	central nervous system agents	test		No	Caregiver
01/27/2019	Children's Ibuprofen 15 daily po	central nervous system agents	test		No	Caregiver
04/15/2019	aliskiren- hydrochlorothiazide 10 mg once a day oral	antihypertensive combinations	water pill		Yes	Patient
05/05/2020	Lave 20 mg oral tablet 1 daily po	cardiovascular agents	Blood thinner		Yes	Caregiver
<b>Discontinued Medication(s)</b>						
<b>Start Date</b>	<b>Medication</b>	<b>Classification</b>	<b>Indication</b>	<b>D/C Date</b>		
03/31/2019	Children's Tylenol 15 test po	central nervous system agents	test	05/16/2019		
03/31/2019	Coumadin 15 daily po	coagulation modifiers	test	05/14/2020		

Select the purple **Sign Medication Profile** button to sign, which will show the following page and includes Patient Information, Medications, Drug Interactions, Active Allergies and Signature. Select the signature checkbox, enter the Date Signed and then select the green **Sign Medication Profile** button.

Sign Medication Profile
Close

**Patient Information**

<b>Benefit Period Associated</b> 04/24/2020 - 06/22/2020	<b>Terminal Diagnosis</b> Other rupture of muscle (nontraumatic), left shoulder	<b>Comorbidities</b> Disorders of muscle in diseases classd elbowr, left shoulder	<b>Attending Physician</b> JONES, ZAUNDRA
---	--	--	--

**Active Medications (4)**

Medication Name Dosage/Route/Frequency	Indication	Start Date Discontinue Date	Added Physician Discontinued Physician	Administered By
Default Lesix 20 Mg Oral Tablet 1 * Po * Daily Stop	Blood Thinner	May 20, 2020	Ashwari Agarwal	Caregiver
Default Apomorphine 14 * Po * Daily Stop	Test	Feb 24, 2019		Caregiver
Default Childrens Ibuprofen 15 * Po * Daily Stop	Test	Jan 27, 2019		Caregiver
Default Aliskiren-hydrochlorothiazide 10 Mg * Oral * Once A Day Stop	Water Pill	Apr 15, 2019	Zaundra Jones	Patient

**Drug Interactions**

Moderate Drug Interaction

View Drug Interaction Report

**Active Allergies**

No Active Allergies Found.



**Signature**

☐ Medication Regimen Review Acknowledgment: I have reviewed all the listed medications for potential adverse effects and drug reactions, including ineffective drug therapy, side effects, drug interactions, duplicate drug therapy, medication allergies, and noncompliance with drug therapy and reviewed significant findings with the physician.

Date Signed \*

MM/DD/YYYY

Sign Medication Profile
Cancel

View previous signed medication profiles by going to the **Signed Medication Profile** tab. Select the  icon to print and/or the  icon to download under the Actions column.



Medication Profile   Detailed Drug Interaction Report   Orders   Signed Medication Profile			
Signed By	No. of Active Medications	Signature Date	Actions
Saikatshna Vinnakota RN, LCSW, BCC	1	05/01/2020	<a href="#">View</a> <a href="#">Download</a>
<div> <div>1</div> <div>1 total results</div> <div>Show 10 entries</div> </div>			

Users can view all associated medication orders in the **Orders** tab. Select the **View Order** hyperlink to view specifics for orders that have not been submitted.

Medication Profile   Detailed Drug Interaction Report   Orders   Signed Medication Profile					
⚠️ - Physician order requires signature					
Task Name	Status	Start Date	Assigned to	Physician	Total Drugs
Physician Order	Submitted With Signature	Nov 13, 2019	Abbott, Matthew	Chopper, Tony Tony	1
Oxybutynin					
⚠️ (Discontinued)					
Task Name	Status	Start Date	Assigned to	Physician	Total Drugs
Physician Order	New Yet Started	Jan 02, 2020	Lathi, Shwetha	Chopper, Tony Tony	1
					<a href="#">View Order</a>
Oxybutynin					
⚠️ (Discontinued)					

## Medication Dispensing Management (Optional Integration)

Axxess Hospice enables organizations with active pharmacy integrations to manage patient medications throughout the ordering process. Through the integration with Hospice Pharmacy Solutions (HPS), clinicians can submit information about medication orders, refills and delivery cancellation requests while completing documentation during patient visits. To perform medication dispensing activity in the medication profile, organizations must activate the HPS pharmacy integration. Contact Axxess to activate.

**Refill Medications** - Active medications can be refilled for patients without physician orders. From the medication profile, select the purple **Refill** button next to the medication to be refilled. Enter the days supply and quantity to be sent to the patient. Select the **Refill Medication** button to send the refill information to the pharmacy.

Morphine 20 Mg/5 ML Oral Solution	Pain, SOB	Jan 18, 2020	Zaundra Jones	Caraghian, Patient, Hospice	Refill Request in Progress
15mg = SL + Q3hr PRN					
Days Supply	Quantity				
Enter Days	Enter Quantity				
<input type="button" value="Refill Medication"/> <input type="button" value="Cancel"/>					

To send multiple refills at once, check the boxes next to the medications you want to refill.

Updates will be added to **saundra.jones** Order scheduled on 06/19/2020. [View Order](#) [Change Order](#) [Save](#)

[Enter Medication Profile](#) [Check Active Drug Interaction](#) [Sign Medication Profile](#) [Refill Selected](#) [Discontinue Selected](#) [Add Medication](#)

Medication Name Dosage/Route/Frequency	Indication	Start Date Discontinue Date	Added Physician Discontinued Physician	Administered By	Actions
<input checked="" type="checkbox"/> <a href="#">Details</a> <a href="#">History</a> <a href="#">Prescriptions</a> <a href="#">Refills</a> <a href="#">Discontinue</a> <a href="#">Add Medication</a> <b>Morphine 20 Mg/5 ML Oral Solution</b> 15mg + SL + Q3hr PRN	Pain, SOB	Jun 16, 2020	Saundra Jones	Caregiver, Patient, Hospice	<a href="#">Edit</a> <a href="#">Refill</a>
<input checked="" type="checkbox"/> <a href="#">Details</a> <a href="#">History</a> <a href="#">Prescriptions</a> <a href="#">Refills</a> <a href="#">Discontinue</a> <a href="#">Add Medication</a> <b>LOXAPAM 0.5 Mg Oral Tablet</b> 1 Tab + PO + Q4hr PRN	Anxiety	Jun 16, 2020	Saundra Jones	Caregiver, Patient, Hospice	<a href="#">Edit</a> <a href="#">Refill</a>
<input checked="" type="checkbox"/> <a href="#">Details</a> <a href="#">History</a> <a href="#">Prescriptions</a> <a href="#">Refills</a> <a href="#">Discontinue</a> <a href="#">Add Medication</a> <b>Nemenda XR 28 Mg Oral Capsule, Extended Release</b> 1 Tab + PO + Daily	Alzheimer's Disease	Jun 16, 2020	Saundra Jones	Caregiver, Patient, Hospice	<a href="#">Edit</a> <a href="#">Refill</a>

Select **Refill Selected** in the top right corner and enter the days supply and quantity for each medication. Select **Remove** to remove a medication from the refill request. Select **Refill Medications** to send the refill information to the pharmacy.

[Refill Medications](#) [Cancel](#)

Medication Name Dosage/Route/Frequency	Indication	Start Date	Days Supply	Quantity	Actions
<a href="#">Details</a> <a href="#">History</a> <a href="#">Prescriptions</a> <a href="#">Refills</a> <a href="#">Discontinue</a> <a href="#">Add Medication</a> <b>Morphine 20 Mg/5 ML Oral Solution</b> 15mg + SL + Q3hr PRN	Pain, SOB	06/16/2020	<input type="text" value="Enter Days"/>	<input type="text" value="Enter Quantity"/>	<a href="#">Remove</a>
<a href="#">Details</a> <a href="#">History</a> <a href="#">Prescriptions</a> <a href="#">Refills</a> <a href="#">Discontinue</a> <a href="#">Add Medication</a> <b>LOXAPAM 0.5 Mg Oral Tablet</b> 1 Tab + PO + Q4hr PRN	Anxiety	06/16/2020	<input type="text" value="Enter Days"/>	<input type="text" value="Enter Quantity"/>	<a href="#">Remove</a>

**Dispensing Medications** - Dispensing information can be viewed for each medication sent to the patient through the pharmacy integration. In the medication profile, a badge below each medication identifies medications that have been dispensed and how many times the medication has been sent to the patient.

Active Medications (4) [View All](#)

<input checked="" type="checkbox"/> <a href="#">Details</a> <a href="#">History</a> <a href="#">Prescriptions</a> <a href="#">Refills</a> <a href="#">Discontinue</a> <a href="#">Add Medication</a> <b>Morphine 20 Mg/5 ML Oral Solution</b> 15mg + SL + Q3hr PRN	Pain, SOB	Jun 16, 2020	Saundra Jones	Caregiver, Patient, Hospice	<a href="#">Edit</a> <a href="#">Refill</a>
--	-----------	--------------	---------------	-----------------------------	---

Select the badge to view dispensing details, including the dispense date, days supply, quantity, the user who requested the delivery, and delivery cancellation information if a cancellation request has been sent.

[Details](#) [History](#) [Prescriptions](#) [Refills](#) [Discontinue](#) [Add Medication](#)  
**Methadone 10 Mg Oral Tablet**  
1 Tab + PO + Q12hr

Dispense Date	Days Supply	Quantity	Requested By	Cancel Date	Cancelled By	Actions
06/16/2020	15	20 tabs	Stephane Adkins	Not available	Not available	<a href="#">Cancel Delivery</a>

+ 1 total results [Show 10 entries](#)

This information can also be reviewed by selecting **View Disperses** from the **Actions** menu.



**Delivery Cancellation** - For delivery cancellation, select **View Disperses** from the Actions menu or select the dispenses badge for the medication you want to cancel. Select **Request Cancel** on the delivery you want to cancel.

Medication: Methadone 10 Mg Oral Tablet		Pain	Jun 16, 2020	Zaundra Jones	Caregiver, Patient, Hospice	Hide Disperses
Dispense Date	Days Supply	Quantity	Requested By	Cancel Date	Cancelled By	Actions
06/16/2020	15	30 tabs	Matthew Abbott	No Disperses	No Disperses	Cancel Delivery
1 total results						
Show 10 entries						

The dispensing information will update to reflect the user who submitted the delivery cancellation and the date the cancellation was made. A badge will be added to the row so users can easily identify canceled deliveries in the dispensing information for that medication.

Medication: Morphine 30 Mg/5 mL Oral Solution		Pain, SOB	Jun 16, 2020	Zaundra Jones	Caregiver, Patient, Hospice	Hide Disperses
Dispense Date	Days Supply	Quantity	Requested By	Cancel Date	Cancelled By	Actions
06/16/2020	15	30mL	Matthew Abbott	No Disperses	No Disperses	Cancel Delivery
06/16/2020	15	30mL	Matthew Abbott	06/16/2020	Matthew Abbott	No Disperses
2 total results						
Show 10 entries						

## Allergy

Print Allergy Profile		No Known Allergies		Add Allergy	
Allergy	Type	Severity	Start Date	End Date	Actions
Active Allergies (1) Hide All					
Tylenol	Medication	Severe	Jan 01, 2000	-	Deactivate Edit
Inactive Allergies (1) Hide All					
Peanuts	Food	Moderate	Jan 01, 2020	May 13, 2020	Restore Edit

This pulls a list of all added allergies for the patient. Select the **Print Allergy Profile** button for a PDF version to view and/or save. Select the **Deactivate** hyperlink under the Actions column to inactivate active allergies. Select the **Restore** hyperlink to reactivate or inactivate allergies. Select the **Edit** hyperlink to make updates. Select the **Add Allergy** button to add.

Add Allergy

<b>Allergy Name *</b> <input type="text" value="Enter Allergy"/>	<b>Start Date *</b> <input type="text" value="MM/DD/YYYY"/>
<b>Reaction *</b> <input type="text" value="Enter Allergic Reaction"/>	<b>End Date</b> <input type="text" value="MM/DD/YYYY"/>
<b>Type *</b> <input type="text" value="Select Allergy Type"/>	<b>Comments</b> <div></div>
<b>Severity</b> <input type="text" value="Select Allergy Severity"/>	
<b>Information Source</b> <input type="text" value="Enter Source"/>	

Enter the Allergy Name, Reaction, Type, Start Date and other available information. Select the **Save Allergy** button or select **Save and Add Another** for additional allergies.

## Plan of Care

This link will take the user to the Plan of Care for the patient. It will be visible in three tabs:

**Comprehensive Plan of Care** - Showing all areas of the Plan of Care in a non-editable view. Users can **Print** and/or **Download** by selecting the buttons in the top right. The Plan of Care is split between Patient Information, Provider Information, Diagnoses, Clinical Information and Additional Orders.

Comprehensive Plan Of Care
Problem Statements
History
Print
Download

### Patient Information

First Name	MI	Last Name	Suffix	Date of Birth	Gender	MRN
Angel	n	Accord		08/15/1960	Female	Accord010
Address Line 1		Address Line 2	City	State	ZIP	Medicare Number
16000 Dallas Pkwy			Dallas	TX	752486607	321654887A
Medicare Beneficiary Identification	Location		Phone Number			
56985478965	Home - Q5001		Home: (214) 575-7711			
Legal Representative	Attending Physician					
	JONES, ZALINDRA NPI: 1902803224 4591 SOCASTEE BLVD MYRTLE BEACH, SC 295887209 (843) 497-5929 (Office), (843) 293-1115 (Fax)					
Admission Date	Level of Care	Benefit Period Start Date	Benefit Period End Date			
11/13/2019		05/11/2020	07/09/2020			

### Provider Information

Provider Name	Provider NPI	Address Line 1	Address Line 2	City
Testing Home Health Agency, Inc	1234567899	Dallas Parkway 16000	1717 E Belt Line Road	Coppell
State	ZIP			
TX	75078			

### Diagnoses

Terminal Diagnosis	Comorbidities
I67.1 Cerebral aneurysm, nonruptured	I30.0 Acute nonspecific idiopathic pericarditis G30.1 Alzheimer's disease with late onset

### Clinical Information

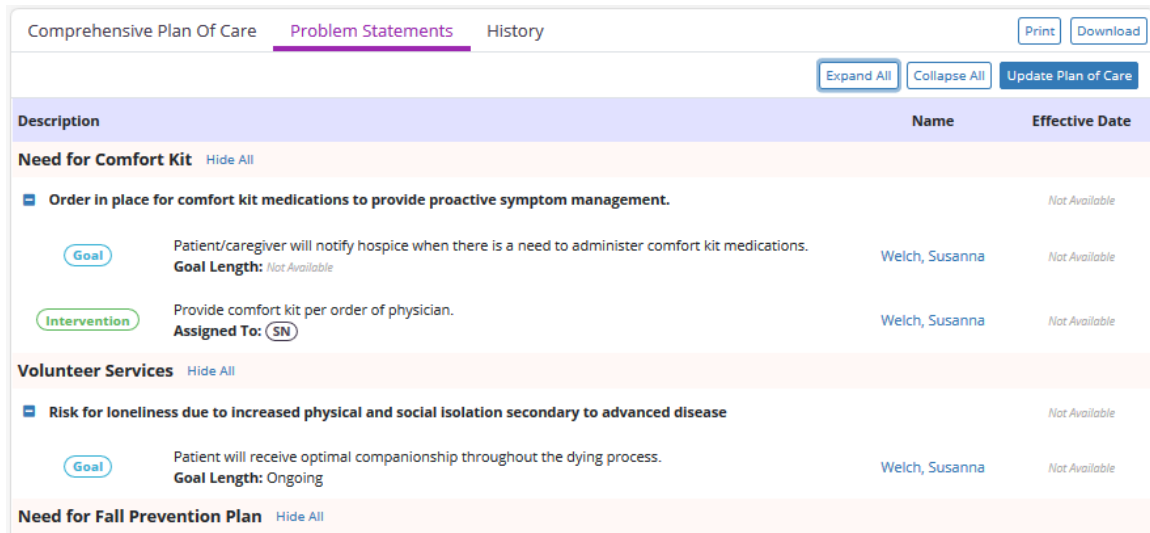
Medications	Allergies
LORazepam 0.5 mg oral tablet, 2 tab: oral 3 times daily, anxiety, Start: 05/11/2020, Caregiver, Patient, Hospice, Covered by Hospice	123, New Allergy, Peanut Allergy, poop
DME	Supplies
Diet	Activities
Emergency Preparedness	Visit Frequencies
Emergency Triage: Moderate The patient's symptoms are managed at this time and services may be postponed and replaced with telephone contact without detriment to the patient.	
Evacuation	
Advance Directives	
Full Code	

### Additional Orders

SN Evaluation Performed: Need for Hospice Services Indicated  
Physician Contact:  
Verbal Certification Received:  
Pronouncement of Death:

**Problem Statements** - Showing the Problems/Goals/Interventions with ability to update. Users can **Print** and/or **Download** by selecting the buttons in the top

right. Expand each problem area by selecting the **View All** hyperlink then expand each problem statement by selecting the **+** icon to view the Intervention & Goal. See all Interventions & Goals by selecting the **Expand All** button or minimizing them by selecting the **Collapse All** button.



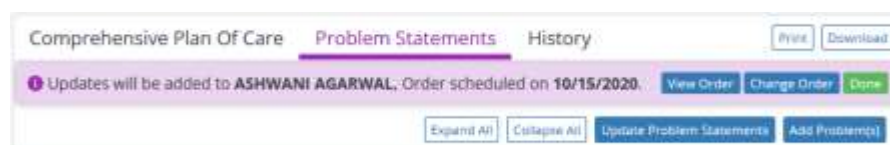
Select the **Update Plan of Care** button to make changes, then select the **Create Physician Order** button.



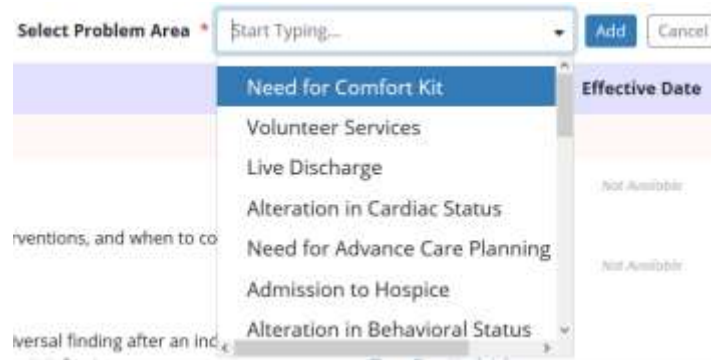
New Physician Order date will be auto-generated to the date it was created. Find physician tied to order and select the **Create** button.



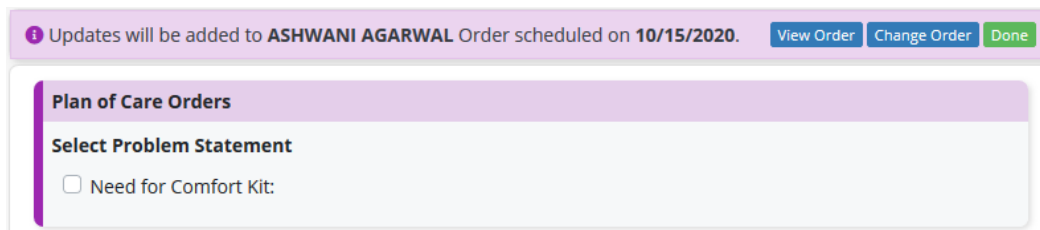
Select the **Add Problem(s)** button once the new physician order is created.



Start typing a Problem Area or select the dropdown area to browse the available list. Select the **Add** button once the desired Problem Area is found.



Select the Problem Statement checkbox and make optional edits to the description.



Select the Goal(s) by selecting the checkbox(es), make edits to the text and choose a Goal Length. Select the Intervention(s) by selecting the checkbox(es), make edits to the text and choose which discipline to assign to (able to choose from than one). Select the **Complete** button when finished.

A green confirmation pop-up will show saying, "Success! You have successfully added Problem(s)." Then choose to **Go to Plan of Care** or Close.



**Goals**

☒ Verbalize Understanding of Medications:

Patient/caregiver will verbalize understanding of administration, dosing, and indication for each comfort kit medication.

**Goal Length**

☐ Verbalize Proper Storage:

☐ Call Hospice for Initial Use:

☐ Other:

**Interventions**

☒ Perform: Provide Comfort Kit:

Provide comfort kit per order of physician.

**Assign to:**

☐ Teach SN

☐ Teach MSW

Assignments:



**NOTE:** Asterisks must be removed with patient related information to save.











**History** - Showing Pending and Active Plans of Care for patient. Select the **Name** hyperlink to view the Plan of Care.


Comprehensive Plan Of Care    Problem Statements <u>History</u>				
Name	Start Date	Assigned to	Status	
<a href="#">Initial Plan of Care</a>	09/30/2019	Thibodeaux, Travis	Active	
<a href="#">Physician Order - Need for Comfort Kit</a>	12/13/2019	Welch, Susanna	Pending	
<a href="#">Physician Order - Volunteer Services</a>	12/13/2019	Welch, Susanna	Pending	
<a href="#">Physician Order - Need for Fall Prevention Plan</a>	01/23/2020	Barkins, Lorna	Pending	
<a href="#">Physician Order - Alteration in Comfort: Pain</a>	01/23/2020	Barkins, Lorna	Pending	
<a href="#">Recert Plan Of Care</a>	01/10/2020	Santos, Jean	Active	
<a href="#">Physician Order - Need for Infection Management</a>	04/02/2020	Noack, Heidi	Pending	
<a href="#">Physician Order - Need for Infection Management</a>	04/02/2020	Cinquegrana, Brandon	Pending	





## Diagnosis


Shows the list of previously ordered diagnoses. Select the **View Details** hyperlink to see the specific diagnoses including Code, Description, Related and Start Date. Select the  icon to print and/or the  icon to download under the Actions column.

Saved By	Date		Actions		
Matthew Abbott	09/22/2020		Action in Progress		
ICD-10 Code	Description	Related	Start Date	Resolved Date	Actions
I67.1 <span>Terminal Diagnosis</span>	Cerebral aneurysm, nonruptured		04/01/2020	Current	
I30.0	Acute nonspecific idiopathic pericarditis	Yes	02/01/2020	Current	
G30.1	Alzheimer's disease with late onset	Yes	01/01/2020	Current	
I10	Essential (primary) hypertension	Yes	09/22/2020	Current	
<div>Cancel</div>					
Jean Santos		04/01/2020	View Details  		
Jean Santos		04/01/2020	View Details  		
Saikrishna Vinnakota		02/20/2020	View Details  		

Select the  icon to change whether the diagnosis is related. Then select the green **Add** hyperlink to save any changes.

ICD-10 Code	Description	Related	Start Date	Resolved Date	Actions
I67.1 <span>Terminal Diagnosis</span>	Cerebral aneurysm, nonruptured		04/01/2020	Current	
I30.0	Acute nonspecific idiopathic pericarditis	Yes	02/01/2020	Current	
G30.1	Alzheimer's disease with late onset	Select Related	01/01/2020	Current	<span>Add</span> <span>Cancel</span>

## Frequency

View Active and Discontinued Frequencies by Discipline, Benefit Period or Date Range. See all frequencies by selecting the **Expand All** button or minimizing them by selecting the **Collapse All** button. Select the  icon to delete, then select the **Yes, Delete** button to confirm.

Disciplines: All

Benefit Period05/28/2020 - 07/26/2020

Date Range05/28/2020 - 07/26/2020

Expand All

Collapse All

Update Frequencies

Discipline	Visit Frequency	PRN	Start Date	End Date	Scheduled Visits	Available Visits	Actions
Active Frequencies (4) <a href="#">Hide All</a>							
Dietary Counselor	3w2	No	Jun 15, 2020	Jun 27, 2020	0	4	
Medical Social Worker	1w1	No	Jun 15, 2020	Jun 20, 2020	0	1	
Skilled Nurse	1w2	No	Jun 15, 2020	Jun 27, 2020	1	1	<a href="#">View Scheduled Tasks</a>
Skilled Nurse	1	Yes	Jul 25, 2020	Jul 26, 2020	0	1	
Discontinued Frequencies (1) <a href="#">Hide All</a>							
Skilled Nurse	2w2	No	Jun 15, 2020	Jun 27, 2020	0	0	

Select the **View Scheduled Tasks** hyperlink to see the list of tasks with hyperlinks to each task and their current status. Select the **Update Frequencies** button to begin the order process.

Select the **Create Physician Order** button unless there are other orders to associate. New Physician Order date will be auto-generated to the date it was created. Find physician tied to order and select the **Create** button.

Updates will be added to <b>ASHWANI AGARWAL</b> . Order scheduled on 10/15/2020. <a href="#">View Order</a> <a href="#">Change Order</a> <a href="#">Done</a>							
Disciplines: All	Benefit Period: 09/19/2020 - 11/17/2020	Date Range: 09/19/2020 - 11/17/2020	Expand All	Collapse All	Add Visit Frequency		
Discipline	Visit Frequency	PRN	Start Date	End Date	Scheduled Visits	Available Visits	Actions
<b>Active Frequencies (0)</b>							

**Discontinue** - Select the **Discontinue** hyperlink, enter the Discontinue Date and then select the **Discontinue Frequency** button.

**Add Frequency** - Select the **Add Visit Frequency** button. Choose the Benefit Period, Discipline, enter the Visit Frequency, enter the Start Date and choose whether the frequency is PRN. Select the **Save Frequency** button when complete or **Save & Add Another** button for additional frequencies.

**Add Visit Frequency**

Accepted frequency format example: 1m1, 2w2, 2wk3, 1ow2, 1d4. Frequency ranges should not be used for Hospice Aide, Homemaker, or Volunteer. PRN Frequencies should not be used for Hospice Aide or Homemaker.

Benefit Period \*

Start Date \*

Discipline \*

Visit Frequency \*

PRN ☐ Yes ☐ No

[Save Frequency](#) [Save & Add Another](#) [Cancel](#)

## Infectious Disease

View previous or add COVID-19 screenings. Select the **View** hyperlink to see previous answers.

Add COVID-19 Screening							
Entered By	Type of Screening	Person Screened	Name	Screening Date	Screening Results	Risk Level	Actions
Christopher CJ	COVID-19	Patient	Accord, Angel	10/15/2020	Yes- 1/4 questions	Low	<a href="#">View</a>
Jordyn Waugh	COVID-19	Patient	Accord Angel	04/02/2020	Yes- 0/4 questions	High	<a href="#">View</a>
Matthew Abbott	COVID-19	Patient	Accord Angel	03/30/2020	Yes- 1/4 questions	Low	<a href="#">View</a>
Joan Zachariah	COVID-19	Patient	Accord Angel	03/27/2020	Yes- 2/4 questions	Low	<a href="#">View</a>
Charishma Damuluri	COVID-19	Patient	Accord Angel	03/24/2020	Yes- 1/4 questions	Low	<a href="#">View</a>
1 5 total results				Show 10 entries			

Select the **Add COVID-19 Screening** button. Choose the Person Screened and enter their name. Enter the Date of Screening and Time of Screening. Then answer the questions, select the screening acknowledgement checkbox and select the **Sign Screening** button or select the **Sign & Add Another** for additional screenings.

COVID-19 Screening

Complete the following screening questions and select a risk level for the patient and/or household members based on agency policies and procedures.

Person Screened \*

Patient

Name

Accord, Angel

Date of Screening \*

10/15/2020

Time of Screening \*

Enter Time

☐ Refused Screening

Have you traveled internationally within the last 14 days to a country with sustained community transmission?

☐ No
 ☐ Yes

Do you have signs or symptoms of COVID-19, such as fever, chills, cough, shortness of breath, difficulty breathing, fatigue, muscle or body aches, headache, new loss of taste or smell, sore throat, congestion, runny nose, nausea, vomiting or diarrhea?

☐ No
 ☐ Yes

In the last 14 days, have you had contact with someone diagnosed with COVID-19, under investigation for COVID-19, or with a respiratory illness?

☐ No
 ☐ Yes

Do you live in an area where community-based spread of COVID-19 is occurring?

☐ No
 ☐ Yes

Risk Level:

☐ Low
 ☐ High

☐ Screening Acknowledgement: I have screened the above-selected person prior to providing care. Agency policies and procedures were followed to prevent the spread of COVID-19 based on the results of this screening or refusal to complete the screening.

Sign Screening

Sign & Add Another

Cancel

## NEW ORDERS

### *Schedule/Patient Schedule/Add Task/Physician Order*

Choose Physician Order when adding a new task then select the order on the calendar and fill out the following fields:

- Physician - Defaults to Attending Physician, editable with ability to change physician to any physician in patient chart using type ahead or add new physician. Required field.
- Copy To - Text box with ability to add any physician in patient chart using type ahead or add new physician. NOT required field.
- Effective Date - Enter date, defaults to current date. Date can be in the past.
- Time - Editable text box with Time Picker, default to current time.
- Summary/Title - Text box with ability to enter letters and numbers.

**Order Information**

**Physician \***  
JONES, ZAUNDRA

**Order Date \***  
10/15/2020

**Effective Date \***  
10/15/2020

**Time \***  
Enter Time

**Copy To (Optional)**  
Enter Additional Recipient Nam

**Summary/Title**  
Enter Summary/Title

**Order Types**

Medication
Plan of Care
Frequency
Level of Care
Diagnoses
Supplies
DME
Activity
Diet
Other

**Order Details**  

☐ Order Read Back and Verified

Cancel Save Complete

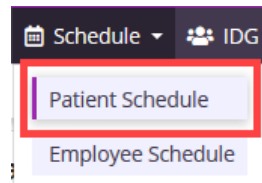
- Order Types:
  - Medication
  - Plan of Care
  - Frequency
  - Level of Care

- Diagnosis
- Supplies
- DME
- Activity
- Diet
- Other
- Enter Order Details in free text space.
- Select whether order is Order Read Back and Verified.

Select the **Save** button to return to later or select the **Complete** button when finished.

## SCHEDULE ACTIVITY

### *Schedule/Patient Schedule*



Branch: All | Status: Active | Level of Care: All

Search Patient: \_\_\_\_\_

Accord, Angel

Accord, Chunkmunk

Adams, Scarlett

Again, Checking

AJASA, BABAWALE

Alarcon, Irene

Alejandro, Heji

Alfonzo, Greg

Alhambra, Patricia

Alejandro, Heji

Alpha, AB

Alvin, de Chipmunk

Arakulapo-Ruti, Fela

**Accord, Chunkmunk** | Accord0195 | Quick Links | Print Schedule

Female • 17 Years Old • Routine Home Care • **Task**

16000 Dallas Parkway, Dallas, TX • (972) 689-5669 • 12/02/2002 • [Show Details](#)

Active

Ordered Disciplines: *Not Available*

**Tasks** | View Frequency Profile | Add Task

Calendar | List | 14 Days | Month

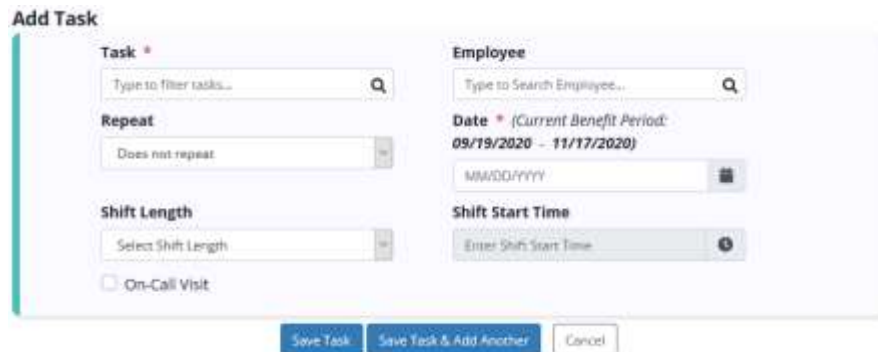
< Oct 11, 2020 - Oct 24, 2020 >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
11	12	13 CJ, Christopher Signed Add Visit Submitted With Signature	14 Bada, Eric Signed Add Visit Not Yet Started	15 Unassigned No Reciprocity Assessment Not Yet Due	15 Today CJ, Christopher Signed Add Visit Submitted With Signature	17
18	19	20	21	22	23	24

The functionality works the same as the Employee Calendar. See *Task Calendar* section above. Visit frequencies are seen in the Patient Information bar at the top of the Schedule view. Scheduled visits can be moved by selecting the visit, dragging and dropping inside another day in the Medicare week. Frequencies can be made monthly, with visits being moved within the current month.

## SCHEDULING A VISIT (PERMISSIONS BASED)

Select the **Add Task** button to schedule a visit.



The 'Add Task' form contains the following fields and controls:

- Task \***: A search input field with the placeholder 'Type to filter tasks...' and a magnifying glass icon.
- Repeat**: A dropdown menu with the selected option 'Does not repeat'.
- Shift Length**: A dropdown menu with the selected option 'Select Shift Length'.
- On-Call Visit**: A checkbox.
- Employee**: A search input field with the placeholder 'Type to Search Employee...' and a magnifying glass icon.
- Date \***: A date range selector showing '(Current Benefit Period: 09/19/2020 - 11/17/2020)' and a date input field with a calendar icon.
- Shift Start Time**: A text input field with the placeholder 'Enter Shift Start Time' and a clock icon.
- Buttons**: 'Save Task', 'Save Task & Add Another', and 'Cancel'.

Start typing the name of the Task or choose from the drop-down list. Then start typing the name of the Employee and results will narrow for choices. Repeat the Task either Weekly, Biweekly or Monthly. Choose Flexible under the Repeat drop-down to add multiple tasks under the Date entry. Choose a Shift Length from 1-12 hours in hour increments. If a Shift Length is chosen, then a Shift Start Time must be chosen. Select the On-Call Visit checkbox if applicable. Select the **Save Task & Add Another** button if there is more than one Task to add or select **Save Task** for adding a single task.

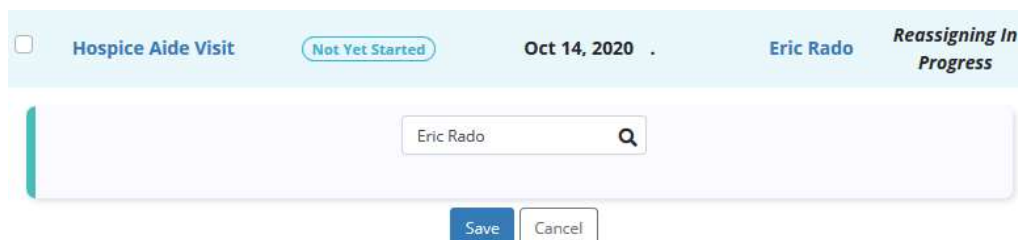
Manage individual tasks by choosing any of the five options under the Action column next to each task. Reassign, Missed Visit (current/past due tasks), Print, Download or Delete a task.



A row in a task list with the following elements:

- ☐
- Hospice Aide Visit
- Not Yet Started
- Oct 14, 2020
- Eric Rado
- Actions menu (Print, Download, Delete, and a three-dot menu icon, which is highlighted with a red box).

If the user chooses to reassign a single task, select the three dot button, then choose **Reassign**. A search option will appear to find another clinician. Once found, select the **Save** button to complete.



The 'Reassign task' modal shows the task details and a search for a new clinician:

- ☐ Hospice Aide Visit
- Not Yet Started
- Oct 14, 2020
- Eric Rado
- Reassigning In Progress
- Search input field with 'Eric Rado' and a magnifying glass icon.
- Buttons: 'Save' and 'Cancel'.



## Deleting Visits (Permissions Based)

To delete visits (before completion), select the checkbox to the left of the Task name and then select the **Delete Selected** button in the top right of the chart schedule. To delete all tasks (before completion), select the checkbox in the purple column header, which selects all visits, and select **Delete Selected**.



## HOSPICE RN ASSESSMENTS

When charting information in the RN Initial/Comprehensive Assessment visit, some information has already been pulled from the patient's profile. Answer all required questions for the rest of the visit. These are indicated by red asterisks. Even though the following example is for RN, the colors below apply to all Clinical Documents for all disciplines.

- **Green Boxes** - Information in the green boxes are the HIS questions that will be exported to CMS.
- **Purple Boxes** - These questions generate Plan of Care orders.
- **Blue Boxes** - Physical Assessment questions.
- **Teal Boxes** - Visit Information, Patient Profile, Incident/Accident/Infection, reports, Care Coordination notes, etc.

RN Initial/Comprehensive Assessment

Administrative Information

Patient History & Diagnosis

Advance Care Planning

Spiritual/Emotional

Supportive Assistance

Neuro/Behavioral

Sensory

Pain

Respiratory

Cardiac

Elimination

Functional

Endocrine

Hematological

Integumentary

Nutrition

Medications

Patient: **Pierson, Sirius** TX122 Quick Links

Male • 80 Years Old • No Level of Care Selected • **Visit Date** • **Visit Time**

Assigned to CJ, Christopher for 10/16/2020

**Visit Information**

Visit Date \* 10/16/2020 Visit Time In \* 8:00 AM Visit Time Out \* 12:00 PM Travel Time In \* 8:00 AM Travel Time Out \* 12:00 PM

Documentation Time (Minutes) \* 30 Associated Mileage \* 10 Surcharge \* 0

**Demographics**

First Name \* Sirius Last Name \* Pierson MI \* Suffix \* Date of Birth \* 08/14/1940 Gender \* Male

Marital Status \* Single Race/Ethnicity \* White

**Patient Address**

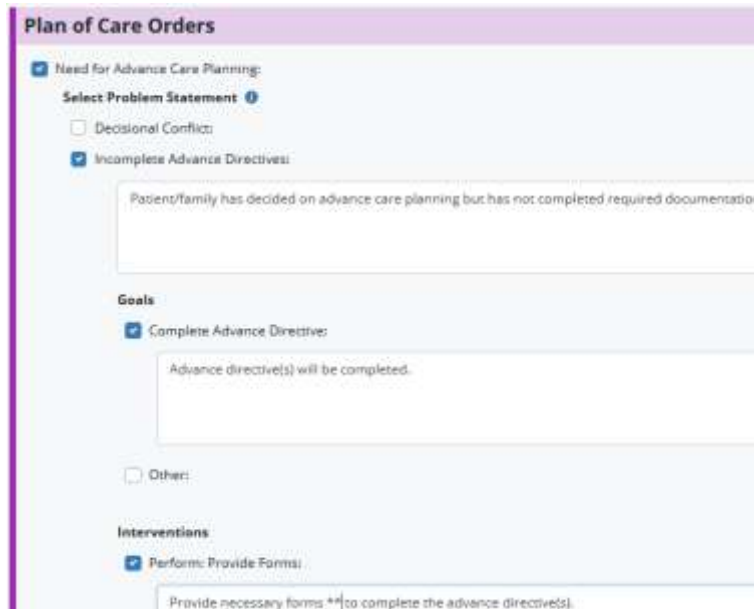
Address Line 1 \* 18000 Dallas Pkwy

**Contact Information**

Primary Phone Number \* Mobile (214) 704-8435 Alternate Phone Number \* Home

Initial Plan of Care (IPOC) - Hospice RN Initial/Comprehensive Assessment and RN Initial Assessment create the Initial Plan of Care (IPOC) for creating initial orders for care. Except for Demographic information, all data that will flow to the Initial Plan of Care is from the Summary Section, including Physician Orders section and Patient/Caregiver Goals. There is a button in the Plan of Care Review section to initiate a brief Initial Plan of Care to address the immediate care needs of the patient/caregiver.

Plan of Care Orders - In purple sections at the bottom of RN Initial/Comprehensive and RN Comprehensive Assessments, there are areas to document the Plan of Care needs for the problem area being assessed. If asterisks (\*) are present, then the system is requiring customized information.



Throughout clinical documentation for each discipline, required fields are identified with red asterisks. When **Save** or **Complete** is selected, each required field is automatically checked for completion. If any information is missing, a warning message alerts the user to complete the missing information.



Items that are left blank or have incorrect information will be highlighted in red and a brief explanation of the error will be provided.



Visit Time In *	Visit Time Out *
<input type="text" value="Enter Time"/>	<input type="text" value="Enter Time"/>
Visit Time In is required	Visit Time Out is required

The software will automatically move to the next field that requires correction so that each item can be corrected before attempting to save or complete the document again. Once all necessary corrections have been made, a success message will appear on completion.

The HIS scrubber can be run on-demand at any time by selecting the **Check Errors** button at the bottom of the RN Initial/Comprehensive Assessment and the RN Comprehensive Assessment. The system will make sure all HIS questions are answered and not conflicting. When the Inconsistency is selected, the user will be taken to the area of the inconsistency. The area will also slightly shake visibly.

⌵ **Inconsistencies (2)**

**J0900A** MAY not meet best practice standards (J0900) Pain Screening A. Was the patient screened for pain = 0 - No

In addition to Check Errors, the software will also automatically run the HIS scrubber for the RN Initial/Comprehensive Assessment and RN Comprehensive Assessment when the **Complete** button is selected in these documents. Any errors, inconsistencies or warnings will display at the top of the assessment.

⌵ **Errors (2)**
⌵ **Inconsistencies (2)**
View More Show All Check Again

**F0500A** Formatting issue (F0500) Scheduled Opioid A. Was a scheduled opioid initiated or continued = (SKIPPED) Not A Valid Response

Use the arrow buttons to move between each error, inconsistency and/or warning. As the users moves through each message, the software will automatically move to the appropriate section and highlight the information that needs to be reviewed or corrected. Select **Show All** to view all errors, inconsistencies and warnings as a list. Select **Collapse** to close the list and return to the document.

**Fatal Audits**
Collapse

**F0500A** Formatting issue (F0500) CPR Preference A. Was the patient asked about CPR = 1 - Yes, Occurred Not A Valid Response

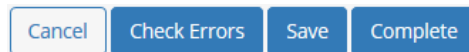
**F2100A** Formatting issue (F2100) Other Life-Sustaining Treatment Preferences A. Was the patient asked about life-sustaining treatments other than CPR = (SKIPPED) Not A Valid Response

**Inconsistencies**

**J0900A** MAY not meet best practice standards (J0900) Hospitalization Preference A. Was the patient asked about preference regarding hospitalization = 0 - No

Once all necessary corrections have been made, select **Check Again** to re-check the document by the HIS scrubber. All errors must be corrected before the document can be completed to prevent the HIS data from being rejected by CMS. While all errors must be corrected, documents can be completed if inconsistencies and warnings remain.

If no warnings or errors are found, then a green disappearing notification will show confirming, "Success."



Select the **Save** button to keep the progress of the visit. Select **Complete** when the user is done with documentation. A popup will appear, and the user must select the checkbox to sign the document then select **Complete**.



The Initial Plan of Care is visible after the RN Initial Assessment or RN Initial/Comprehensive Assessment has been approved from the QA Center. A draft view will be visible from the Action menu prior to final approval of content.

## Add Addendum

To add a document addendum, go to *Schedule/Patient Schedule* or *Employee Schedule*. Toggle to the **List** view and locate the task to update. Select **Add Addendum** from the Actions menu. This action will only be available for completed tasks that are assigned to the user.

Matthew Abbott matbott@axxess.com View People Center

Tasks Infection Reports

Calendar List 14 Days Month < Jul 19, 2020 - Aug 01, 2020 > Custom Schedule Bulk Update Add Task

Task	Status	Schedule Start	Schedule End	Patient	Actions
Skilled Nurse Visit	Completed	Jul 21, 2020	-	Afonso, Greg	
Skilled Nurse Visit	Not Yet Started	Jul 21, 2020	-	Hoskins, Jake	
Skilled Nurse Visit	Completed	Jul 22, 2020	-	Hoskins, Jake	
Skilled Nurse Visit	Completed	Jul 22, 2020	-	Afonso, Greg	Add Addendum



Enter the Reason for the Addendum and select the **Start Addendum** button to begin making changes. If necessary, the reason for the addendum can be updated after changes have been made to the document.



Once the changes are complete, select the **Confirm Changes** button at the bottom of the screen. Review the reason for the addendum and update as needed. To complete the addendum, select **Complete** and sign the document. Select **Cancel** to return to the document and continue making changes. Once the document has been signed, it will be sent to the QA Center for review.

Documents with addenda will be labeled with an **Addendum** badge displaying the number of addenda associated with the task. To view the document versions, select the badge or select **View Addendum** from the more menu in the Actions column.

Task	Status	Schedule Start	Schedule End	Patient	Actions
Skilled Nurse Visit	<b>1 Addendum</b>	Completed	Aug 06, 2020	Alfonse, Greg	  

When the **Addendum** badge or **View Addendum** button is selected, a table will open to display each completed version of the document, the status of each version, the user who completed the document, and when the document version was completed. Select the  or  icon to view a document.

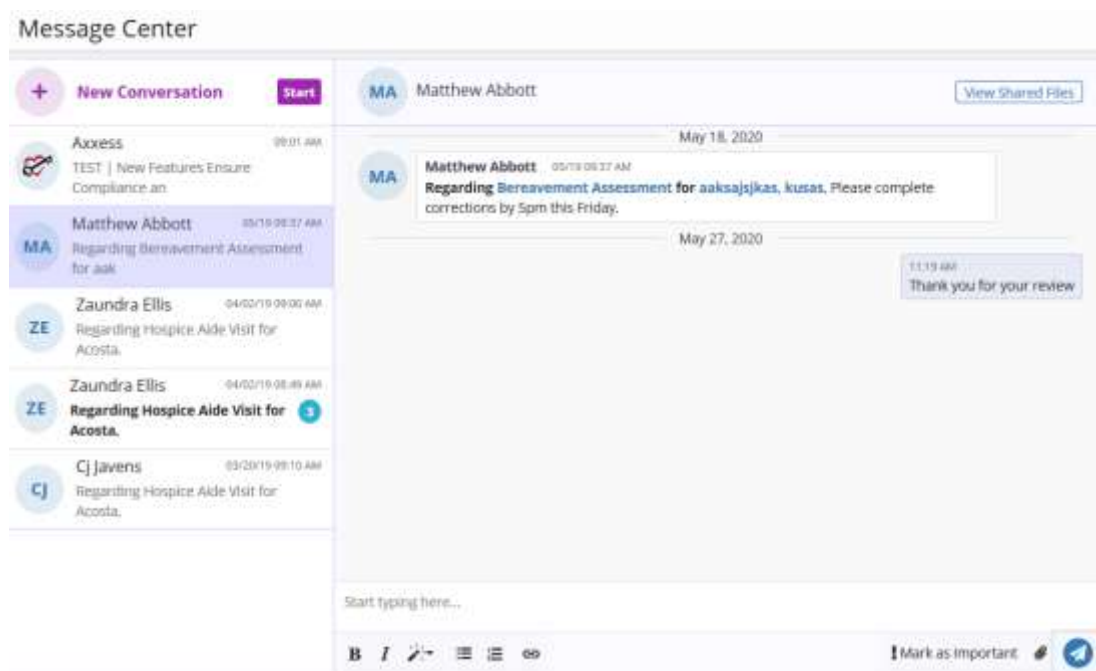
Skilled Nurse Visit <b>1 Addendum</b> Completed Aug 06, 2020 Alfonse, First Hide Addendum				
Addendum Version	Status	Completed On	Completed By	Actions
1.	Completed	Aug 07, 2020	Matthew Abbott	 
Original Document	Completed	Aug 07, 2020	Matthew Abbott	 

## MESSAGE CENTER



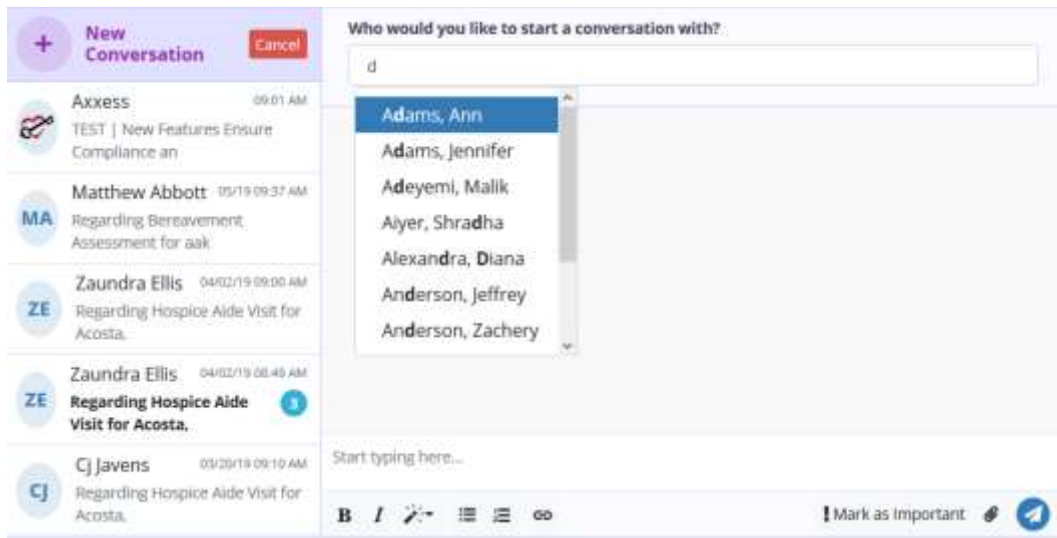
The Message Center is a place for all staff to communicate internally related to patient care with functionality to attach items and message groups as well as individuals. There are two ways to access notifications/messages:

1. Select the envelope icon at the top right side of the page.
2. My Dashboard has a hyperlink to **View All Messages** at the bottom of the Unread Messages tile.



Search through conversations by entering text in the search field. Select the purple Start button create a new conversation.

**New Conversation** - Start typing the name of a desired user in the organization, then select when given a choice from drop down options.



Start writing the conversation in the text box at the bottom of the page that says, “Start typing here...” Change text in the bar right below the text box.



! - Mark the importance of a message.



- Add attachment to message.



- Send message.

## 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/>

