

HOME CARE CLINICIAN TRAINING MANUAL

January 2022

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LOGGING IN

Go to www.axxess.com, and select the **LOGIN** button, located in the upper, right-hand corner.



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

The image shows the AXXESS login form. It has a white background with the AXXESS logo at the top. Below the logo, there are two input fields: 'Email address' and 'Password'. The password field is masked with asterisks. Below the password field, there is a checkbox labeled 'Remember Me' and a link 'Forgot your Password?'. A large red button labeled 'Secure Login' is centered below the input fields. Below the button, there is a link 'Need Help?'. At the bottom of the form, there is a small copyright notice: 'Axxess | Copyright © 2006 - 2021 | All Rights Reserved | Dallas, Texas'.

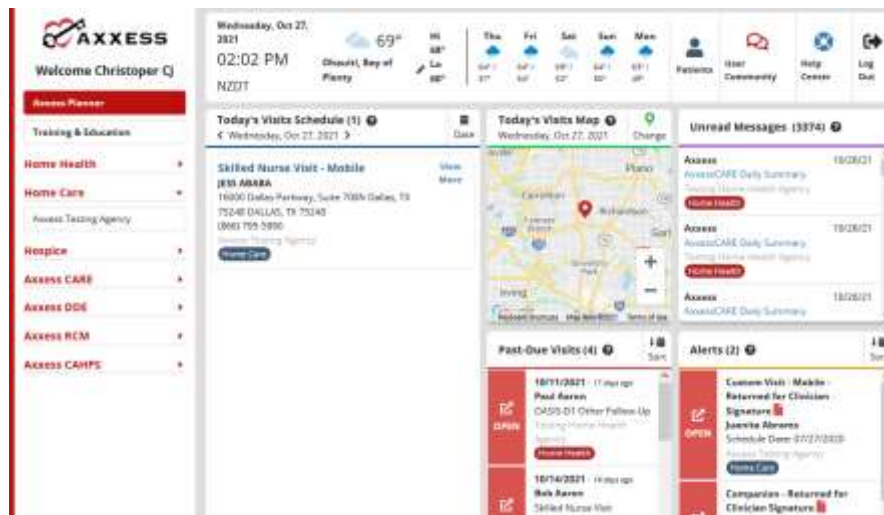
The username is the email address assigned to the users account when it was created. The password was created by the user, from a link that was sent to this email address. This password will also be the user's electronic signature.

If the user forgets their password, select **Forgot your Password** and a link will be sent to this email address. The user will be able to reset their password, however, the electronic signature will remain the same (resetting signature will be covered later). After the correct username and password have been entered, the following message will display:



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

AXXESS PLANNER



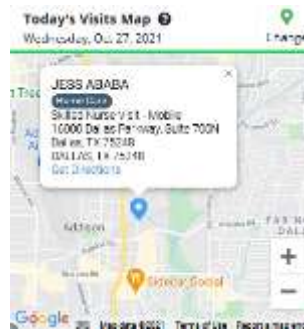
- Date/Time/Weather - Today's date, time and five-day weather forecast for the user's specific area.
- Today's Visits Schedule - Calendar that shows the user's visit schedule (red dots on the dates the user has visits).
 - Selecting the day will bring up the tasks schedule. Selecting the Task will show the status of the visit. Then select the client name to go directly to the client's Chart.
- Today's Visits Map - View directions for the users' daily visits or plan out their route.

Green - Current Location

Red - Visit Location

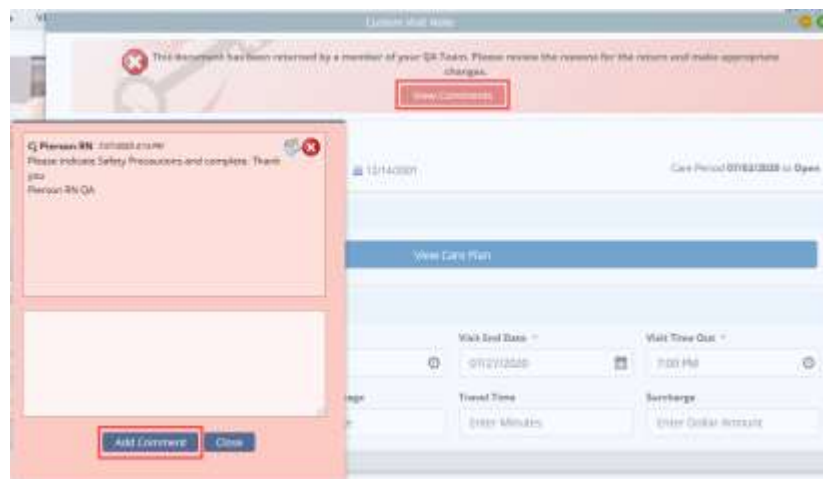
Blue - Selected Visit

Select the marker to view the details of the visit.



Select **Get Directions**, and this will take the user to Google Maps, giving step by step list of directions and the visual map.

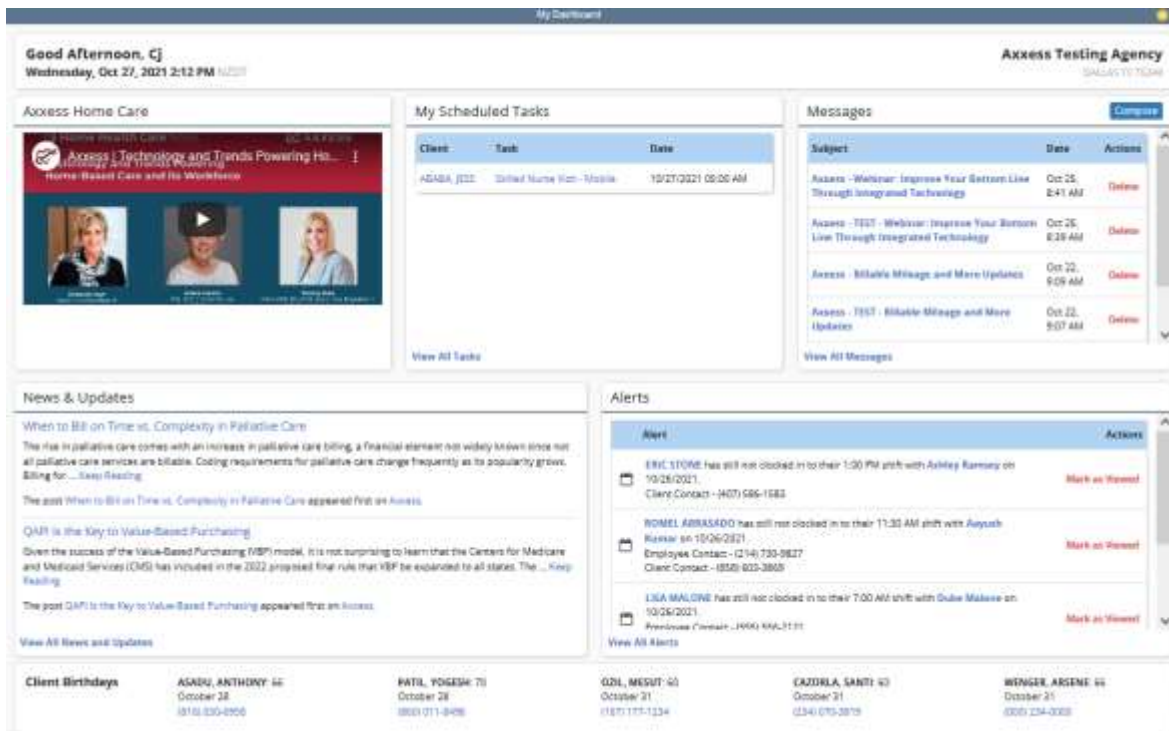
- Unread Messages - A list of unread messages from the Internal Messaging Center. Selecting a message will take the user directly to the messaging center.
- Past-Due Visits - A list of visits from the last 21 days that have not been completed and signed.
 - Selecting the red **OPEN** tab on the left-hand side of the visit will show the note and allow users to view the chart. The visits list from oldest to newest and can be sorted to reverse the order from newest to oldest.
- Alerts - A list of all visits/tasks that have been returned to the user from the QA Center.
 - Hover over the red sticky note to view comments from QA.
 - Select the orange **OPEN** tab to chart on the note/visit.
 - Inside the note, a message will be displayed that the document has been returned by QA. Select **View Comments** to read the message and send back any response.



On the left-hand side of screen, is a list of organizations that the user works with, as well as multiple products their organization subscribes to.

DASHBOARD

Opens upon log in. Below are the six tiles for all clinicians:



The screenshot shows the Axxess Dashboard for a user named 'Good Afternoon, CJ' on Wednesday, Oct 27, 2021 at 2:12 PM. The dashboard is organized into several sections:

- Access Home Care:** Features a video titled 'Access Technology and Trends Powering Home-Based Care and Its Workforce' with three speakers.
- My Scheduled Tasks:** A table with columns 'Client', 'Task', and 'Date'. It shows one task for 'ADANA, JESS' with the task 'Dialysis Nurse Visit - Mobile' scheduled for '10/27/2021 09:00 AM'.
- Messages:** A list of messages with columns 'Subject', 'Date', and 'Actions'. It includes messages about 'Webinar: Improve Your Bottom Line Through Integrated Technology' and 'Bilal's Mileage and More Updates'.
- News & Updates:** A section with articles such as 'When to Bill on Time vs. Complexity in Palliative Care' and 'QAPI is the Key to Value-Based Purchasing'.
- Alerts:** A section with alerts for clocked-in/out times for staff members like 'ERIC STONE' and 'ROMEL ABRASADO'.
- Client Birthdays:** A section listing birthdays for clients like 'ASARI, ANTHONY', 'PATIL, YOGESH', 'GIL, MERIT', 'CAJZOLA, SANTI', and 'WENGER, ARGENT'.

1. Welcome Panel - Items for subscribers to Axxess products. These will include items such as important announcements and training videos.
2. My Scheduled Tasks - Electronic "To-Do" list. Users can quickly access a client chart and/or tasks for the first five clients on their to-do list.
3. Messages - HIPAA-compliant messaging center, allowing all users to communicate in a secure manner. When the user receives messages, notifications will be sent to the user's email assigned to their account.
4. News & Updates - Links to Axxess generated blog posts, educational articles, regulatory updates and other important information.
5. Alerts - Provides direct access to important alerts.
6. Client Birthdays - This is a quick reminder of the clients who will celebrate birthdays in the upcoming week/month.

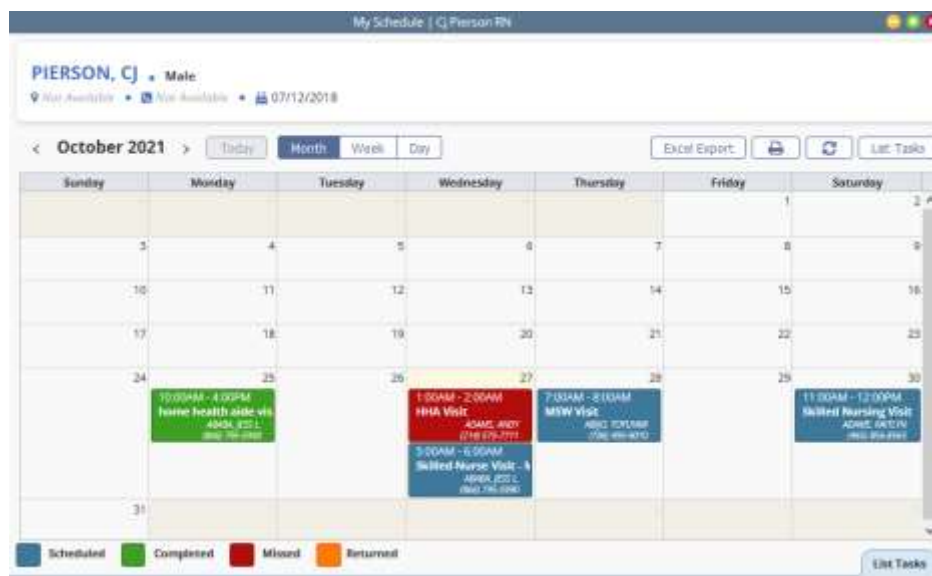
My Scheduled Tasks



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

My Scheduled Tasks

Client	Task	Date
ABADA, JESS	Skilled Nurse Visit - Mobile	10/27/2021 05:00 AM
ADAMS, ANDY	HHA Visit	10/27/2021 01:00 AM
ABIJO, TOFJUNMI	MSW Visit	10/28/2021 07:00 AM
ADAMS, KAITLYN	Skilled Nursing Visit	10/30/2021 11:00 AM

[View All Tasks](#)









- View the calendar by Month, Week or Day.
- Export the data into a spreadsheet by selecting the **Excel Export** button.
- Print the calendar by selecting the  icon.
- Refresh the page by selecting the  icon.

Tasks will show in four different colors:



Hovering over a task will give the following options:





- Edit Document  - Jumps straight into documentation for the client.
- Print - Displays the print view of the document. From here, the document may be downloaded or printed.
- Missed Visit Form  - see *below*.
- Edit Scheduled Date/Time  - Update the date and time of the task.
- Reassign  - Assign the task to another user.
- Delete  - Remove the task entirely.

See the tasks in a list by selecting the **List Tasks** button at the top right or the **List Tasks** tab on the bottom right. Selecting the  button will give users the same functionality as hovering in the calendar view.

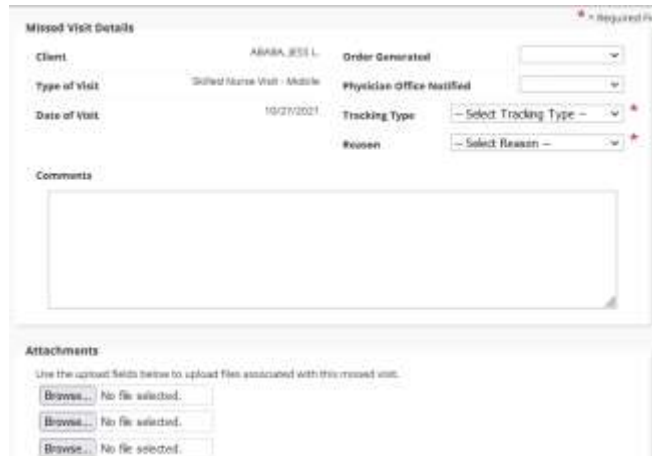



Task	Payment Source	Start Time	End Time	Client	Status	Action
Home health aide visit	Private (Self Pay)	10/25/21 10:00 AM	10/25/21 4:00 PM	ABABA, JESS L.	Submitted Pending Co-Signature	  
HHA Visit	Medicaid-HCFA 1500	10/27/21 1:00 AM	10/27/21 2:00 AM	ADAMS, ANDY	Missed Visit (Pending)	  
Skilled Nurse Visit - Mobile	Bob's Invoice	10/27/21 5:00 AM	10/27/21 6:00 AM	ABABA, JESS L.	Not Yet Due	  
MDW Visit	Private (Self Pay)	10/28/21 7:00 AM	10/28/21 8:00 AM	ABJO, TOFUNMI	Not Yet Due	  
Skilled Nursing Visit	Private (Self Pay)	10/30/21 11:00 AM	10/30/21 12:00 PM	ADAMS, KATLYN	Not Yet Due	  

Sticky Notes:

-  Orange - Return Reason from either QA Center or another clinician.
-  Yellow - A note pertaining specifically to this visit, that communicates to other users.
-  Red - Missed Visit
-  Blue - A note that has information for every visit in a care period (ex. A gate code or where to park). This information will appear in a sticky note on every visit in that care period.

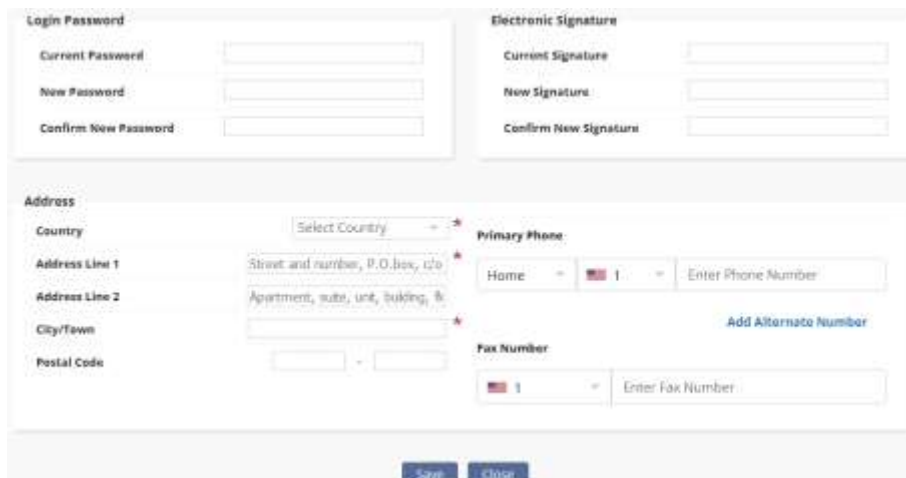
Missed Visit Form - Select the Missed Visit Form icon, and a window will pop up, asking whether an Order [was] Generated, Physician Office Notified, Reason, Comments, and the user's Signature and Date. Then select the **Submit** button. Once submitted, the visit will turn red.



Hovering over the missed visit will allow you to Restore  if mistakenly missed.

EDIT PROFILE

Home/My Account/Edit Profile



If the user knows their current password and/or signature, they can come to this screen and update it with new information. If they do not remember their current signature, they will have to reset their signature.

RESET SIGNATURE

Home/My Account/Reset Signature

Reset Signature

Click on the button below to reset your signature. An e-mail with instructions on how to reset your signature will be sent to @gmail.com.

[Reset Signature](#) [Cancel](#)

When users select the **Reset Signature** button, a link will be sent to the email address listed in the message, allowing them to create a new signature.

CLIENT CENTER

Clients/Client Center

Client Center | Access Testing Agency

Branch: All Branches Status: Active Type: All Payer: All Tags: Find:

Create View Profiles Schedule Documents Billing

ABABA, JESS L. Female, Age 41 - MRN: G051192630
Physician: Abbott, Nicole

DOB: 03/12/1980 Phone: (866) 795-5990
SOC: 07/22/2021 Phone Type: Work Medical: No

[Change Photo] [Edit] [More] [Directions] [Admissions]

Refresh Schedule Activity Change Status

Quick Reports:
Client Profile
Treatment Profile
Medication Profile
Infectious Disease Profile
Immunization Profile
Allergy Profile
Authorizations Listing

Last Name	First Name
ABABA	JESS L
ABEL	AMY
ABIJO	TOFUNMI
ABRAMS	JUANITA
ADAM	BILDAD
ADAM	MARCIE
ADAMS	ANDY
ADAMS	JACK
ADAMS	KAITLYN
ADAMS	MARCIE
ADAMSSS	TOM
ADDISON	MEDICAL

Group by: None Show: All Date: This Care Period 09/20/2021-Open

Task	Date	Time In - Out	Assigned To	Status	Action
SN Test	09/22/2021	N/A	joel Camedalla RN	Not Yet Started	[Icon] [Icon] [Icon]
SH Psychiatric Assessment	09/23/2021	10:00 AM-11:00 AM	CJ Pierson RN	Not Yet Started	[Icon] [Icon] [Icon]
Skilled Nurse Visit - Mobile	09/24/2021	09:00 AM-05:00 PM	Siddhi Chehani RN	Not Yet Started	[Icon] [Icon] [Icon]
MSW Evaluation	09/27/2021	01:00 AM-02:00 AM	Wendy Amerson RN	Missed Visit(Complete)	[Icon] [Icon] [Icon]

Filter by:

- Branch - Choose the branch (if more than one).
- Status - Status of the client (Active, Discharged, Pending, Non-Admit, Hospitalized).
- Type - Medical or Non-Medical.
- Payer - Payer Source.
- Tags - Free text to type in search term.
- Find - Free text to type part of a client's name.



Client Center | Axxess

Branch: All Branches | Status: Active | Type: All | Payer: All | Tags: | Find:

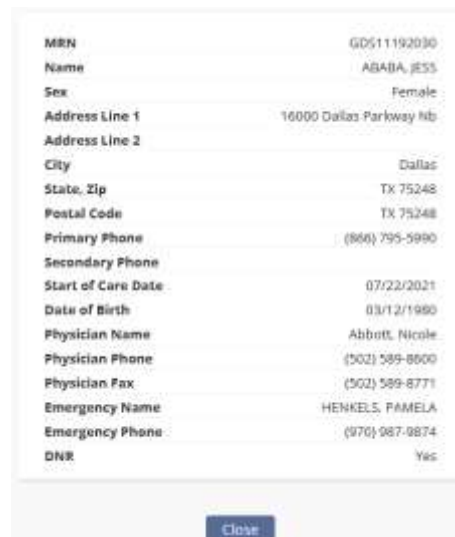
ABABA, JESS
Female, Age 41 - MRN: 6
Physician: Abbott, Nicole
DOB: | SOC:

[Change Photo] [Edit] [More] [Directions] [Refresh] [Schedule]

Group by: None

Task	Date	Time
SN Test	09/22/2021	N/A

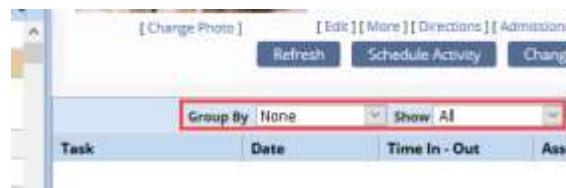
Client's snapshot at the top of the screen gives a quick view of the client's demographics. Select the **More** hyperlink to view the client's Address, Phone Number, Physician Contact info and Emergency contact.



MRN: GD511192030
Name: ABABA, JESS
Sex: Female
Address Line 1: 16000 Dallas Parkway Hb
Address Line 2: |
City: Dallas
State, Zip: TX 75248
Postal Code: TX 75248
Primary Phone: (866) 795-5990
Secondary Phone: |
Start of Care Date: 07/22/2021
Date of Birth: 03/12/1980
Physician Name: Abbott, Nicole
Physician Phone: (502) 589-8600
Physician Fax: (502) 589-8771
Emergency Name: HENKELS, PAMELA
Emergency Phone: (970) 987-9874
DNR: Yes

Close

A list of tasks in the current care period will display at the bottom of the screen. Filter the "Group By" and "Show" drop-down menus to change viewing parameters.



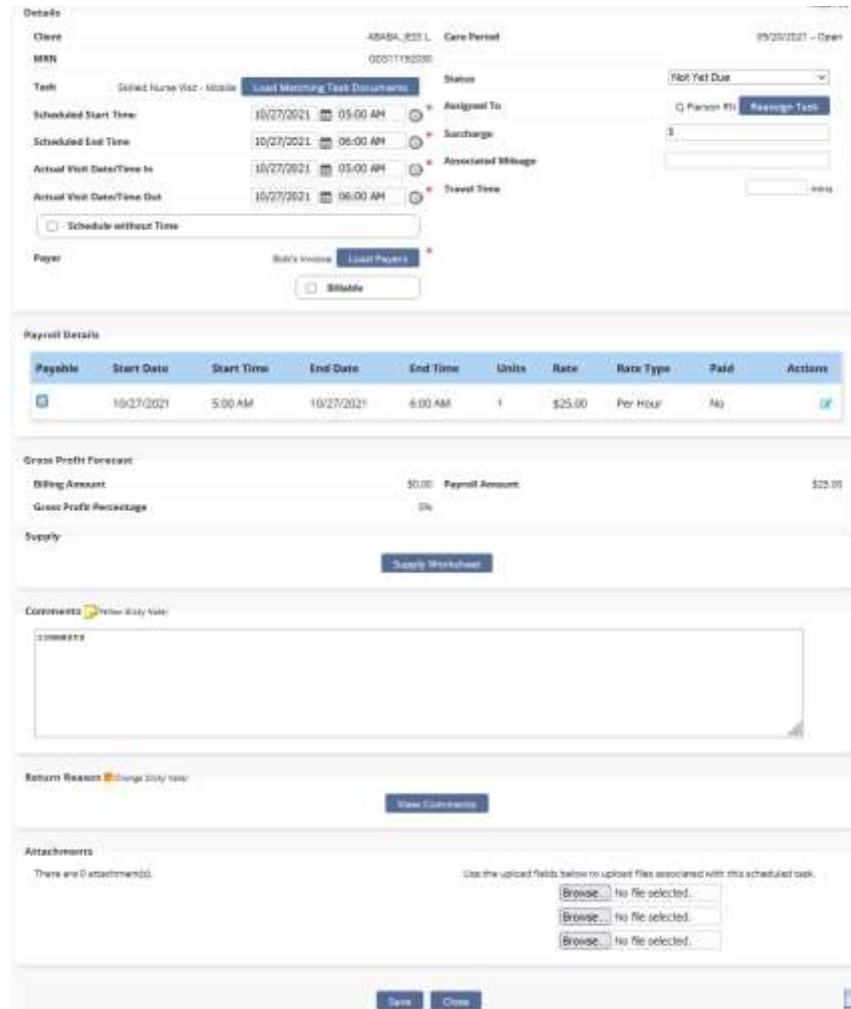
[Change Photo] [Edit] [More] [Directions] [Admissions] [Refresh] [Schedule Activity] [Change]

Group By: None | Show: All

Task	Date	Time In - Out	Assign
------	------	---------------	--------

Select the task/note and start charting if they are not complete. Selecting the blue triangle (under the Action column) will allow viewing of the Details (permissions based):

TASK DETAILS



Details

Client: ASABA, JESS L. Care Period: 09/20/2021 - Open

MRN: 0001192000

Task: Colored Nurse Visit - Mobile [Load Matching Task Documents](#)

Scheduled Start Time: 10/27/2021 05:00 AM

Scheduled End Time: 10/27/2021 06:00 AM

Actual Visit Date/Time In: 10/27/2021 05:00 AM

Actual Visit Date/Time Out: 10/27/2021 06:00 AM

☐ Schedule without Time

Assigned To: Q. Pearson RN [Assign Task](#)

Status: [Task Not Due](#)

Surcharge: \$

Associated Mileage:

Travel Time:

Payer: Bob's Momma [Load Payers](#)

☐ Billable

Payroll Details

Payable	Start Date	Start Time	End Date	End Time	Units	Rate	Rate Type	Paid	Actions
	10/27/2021	5:00 AM	10/27/2021	6:00 AM	1	\$25.00	Per Hour	No	

Gross Profit Forecast

Billing Amount: \$0.00 Payroll Amount: \$25.00

Gross Profit Percentage: 0%

Supply: [Supply Worksheet](#)

Comments Yellow sticky note

[Comments](#)

Return Reason Change sticky note

[View Comments](#)

Attachments

There are 0 attachments.

Use the upload fields below to upload files associated with this scheduled task.

[Browse](#) No file selected.

[Browse](#) No file selected.

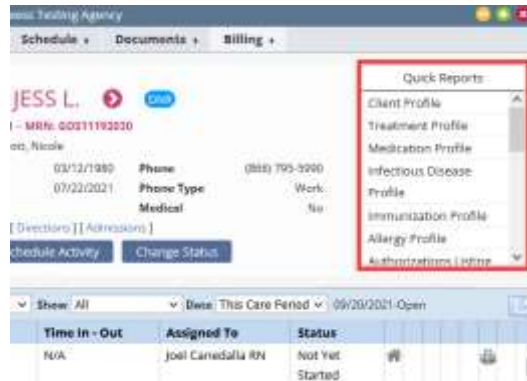
[Browse](#) No file selected.

[Save](#) [Close](#)

- Scheduled Start and End Time - The date the task was scheduled on the calendar.
- Actual Visit Date/Time In and Out - The date/time the task was completed. This is pulling from the task completed by the clinician.
- Assigned to - The clinician that is currently assigned to this task.
- Payer - The payment source for the task can be changed by selecting the **Load Payers** button.

- Comments (Yellow Sticky Note) - Any notes that pertain to this specific visit and are needed to communicate with other users within the organization.

QUICK REPORTS



The screenshot shows the Axxess client profile page for a client named JESS L. The Quick Reports dropdown menu is open, listing the following options: Client Profile, Treatment Profile, Medication Profile, Infectious Disease Profile, Immunization Profile, Allergy Profile, and Authorizations. The Client Profile option is highlighted.

NOTE: The following Quick Reports are permissions based.

Client Profile

PDF print out of the client information taken at admission.




The screenshot shows a PDF printout of the Client Profile for a client named Abrams, Juente. The profile includes the following information:

Access Testing Agency 16000 N Dallas Pkwy #100N Dallas, TX 75248-1234 Phone: (111) 111-1111 Fax: (222) 222-2222		Client Profile	
Name: Abrams, Juente 1237 Prairie Points Dr South Elgin, IL 60177 Phone: (214) 555-5554 PhoneType: Mobile		SOC: 08/11/2017 Gender: Female Office: Dallas Race: Hispanic or Latino Height: 0 in Weight: 0 lb Care Period: 03/01/2016 - 04/29/2016	
MR: 11222 DNR: No		Birth Date: 07/25/1958 Marital: Referral Date: 08/10/2017	
Triage Level:		Emergency Contact	
Insurance		Name	
Blue Cross	755453 Primary	KLEIN, JOSHUA	(817) 705-7138
VA	07 Primary	SOBUSH, SONIA	(952) 454-6541
BCBS of IL	1d Primary	KLEIN, JOSHUA	(458) 123-4567
		ABRAMS, THOMAS	(214) 555-5738
Allergies		Pharmacy	
penicillin		Name: Phone:	
Current Care Period		Primary Physician	
Primary Diagnosis: I50.0 - Heart failure, unspecified		Name: Krutson, Jonathan MD	
Secondary Diagnosis: J44.0 - Chronic obstructive pulmonary disease, unspecified		Address: 5600 S 84th St Suite 120 Lincoln, NE 68516	

Buttons: Download, Print, Close

Treatment Profile



Treatment Profile

Client: ABADA, J28 Primary Diagnosis: N15.8 - Bulimic rephragthy
 Current Care Period: 29/03/2021 - Open Secondary Diagnosis: C01 - Malignant neoplasm of base of tongue

[Add Treatment](#) [Print Treatment Profile](#) [Discontinue Treatments](#)

Start Date	Treatment	Description	Frequency	D/C Date	Action
07/01/2021	Aspiration	Aspiration-Precautions at all times. HOB Elevated 30 degrees with feeding and 30 minutes AFTER feeding. Suction equipment with Patient at all times.	PRN		▶
09/28/2021	Aspiration	Aspiration-Precautions at all times. HOB Elevated 30 degrees with feeding and 30 minutes AFTER feeding. Suction equipment with Patient at all times.	Twice/day		▶

Discontinued Treatment(s)

Start Date	Treatment	Description	Frequency	D/C Date	Action
No Discontinued Treatments					

[Refresh Treatments](#)

The Treatment Profile houses all treatments the client is receiving. The list is split into Active and Discontinued Treatment(s). Add a new treatment by selecting the **Add Treatment** button.



Treatment

Start Date *

End Date *

Treatment *

Description *

Frequency

[Save & Close](#) [Exit](#)

Enter the Start Date and End Date. Choose the Treatment from the drop-down menu. Users with the necessary permissions can add new treatments. Enter a description in the free text space and choose the Frequency from the drop-down menu. Select the **Save & Close** button when finished.

Select the **Print Treatment Profile** button to see a printable view of the treatment profile. Select the **Refresh Treatments** button to make the profile list

up to date. Select the **Reorder Treatments** button to change the order of treatments.



Reorder Treatments

Aspiration

CPT Vast Treatment

Save Close

Select the arrow to either move a treatment up or down the list. Select the **Save** button when finished. There are options under the Action column to either **Edit**, **Discontinue** or **Delete** treatments. Select the Action button and choose **Activate** to move a discontinued treatment into the Active Treatment(s) list.

Medication Profile



Medication Profile | ASADA, JES

Client: ASADA, JES Primary Diagnosis: N15.0 - Bulimic neuropathy

Current Care Period: 05/20/2021 - Open Secondary Diagnosis: C01 - Malignant neoplasm of base of tongue

Allergies: latex Pharmacy Name: Pharmacy Phone:

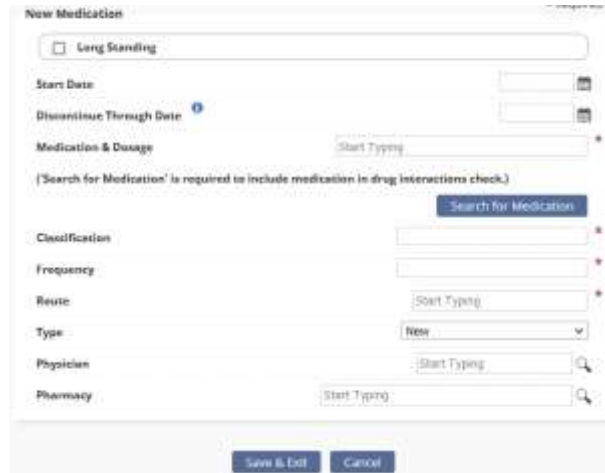
Buttons: Add Medication, Sign Medication Profile, Print Medication Profile, Drug Interactions, Signed Medication Profiles, Reorder Medications

Active Medication(s)								
LS	Start Date	Medication & Dosage	Type	Classification	Physician	Pharmacy	D/C Date	Action
<input checked="" type="checkbox"/>		ADP880 Three times/day By mouth (PO)	R	analgesics	Jeff, Kenneth ATC	CVS 1224 Teasley Lane, DENVER		
<input checked="" type="checkbox"/>		AMAZEPAMOL 2 By mouth (PO)	R	central nervous system agents				
<input type="checkbox"/>		afut adrenal cortex	R	adPb				

Discontinued Medication(s)									
LS	Start Date	Medication & Dosage	Type	Classification	Physician	Pharmacy	D/C Date	Discontinue Reason	Action
<input checked="" type="checkbox"/>		TYLENOL 325 MG OVAL CAPSULE solid tablet	R	central nervous system agents			09/14/2021 12:00 AM	NA	
<input type="checkbox"/>	10/01/2021	PREDNISOLONE 10 MG OVAL TABLET, DISINTEGRATING 1 o daily By mouth (PO)	R	adrenal cortex steroids	Khutson, Jonathan DO	CVS DALLAS	10/15/2021 12:00 AM	NA	

Refresh Medications

Add Medication:



- Long Standing - Has the client been taking medication for an extended period?
- Start Date - Enter or select the calendar icon to choose a date.
- D/C Through Date - Enter or select the calendar icon to choose a date.
- Medication and Dosage - Begin typing the description of the medication, then select **Search for Medication**. A drop-down menu will appear with all the medications that are 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.
- Frequency - Can be written out entirely or with medical shorthand.
- Route - Free text.
- Type - Whether New, Changed or Unchanged.
- Amount – Example: one tab, one puff, one pump.
- Physician - Start typing the name of the physician and a drop-down menu will appear with related physicians.
- Pharmacy - Start typing the name of the pharmacy and a drop-down menu will appear with related pharmacies.
- Select **Save & Exit**.

Decide whether the new medication should **Create Order**. If there are more medications to enter, select **Add Another Medication** if not, select the **Close** button.

Once a medication is added, it will appear on the active Medications. **Edit**, **Delete** or **Discontinue** this medication by hovering over the Action triangle on the right-hand side of the medication.



Check for Drug Interactions:

1. Select the **Drug Interactions** red button at the top of the screen.
2. Select the box next to the medication on the left-hand side.
3. Select **Check Interactions** and a PDF will generate called Drug-Drug Interactions.

Instructions:

Please select the medications below that you will like to check for interactions and click on the "Check Interactions" button.

Grayed out medications have not been selected from the medication database and therefore are excluded from the drug interaction check.

<input type="checkbox"/> Medication & Dosage	Frequency	Route	Classification
<input type="checkbox"/> <i>aspirin</i>	<i>aspirin</i>	<i>aspirin</i>	<i>aspirin</i>
<input checked="" type="checkbox"/> ASPIRIN	Three times/day	By mouth (PO)	analgesics
<input checked="" type="checkbox"/> PARACETAMOL	2	By mouth (PO)	central nervous system agents

Once any updates are made to the Medication Profile, it will need to be signed. Select **Sign Medication Profile** in the upper left. A window will pop up with the Medication Profile, allowing users to enter their signature and date.



Medication Profile Snapshot

Client Name: ABABA, JESS Physician: Abbott, Nicole

Care Period Associated: 09/20/2021 Pharmacy: Start Typing

Primary Diagnosis: H19.0 - Salivary hypoplasia

Secondary Diagnosis: C01 - Malignant neoplasm of base of tongue

Allergies

causes

[Open Allergy Profile](#)

LE	Start Date	Medication & Dosage	Type	Classification	Physician	Pharmacy
<input checked="" type="checkbox"/>		ASPIRIN	R	analgesics	DR. Kenneth ATT.	C01 1234 Testley Lane, DENTON
<input checked="" type="checkbox"/>		PARACETAMOL	N	central nervous system agents		
<input type="checkbox"/>		drug	R	ad/da		

Signatures

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

Physician Signature: _____ Date: _____

[Sign](#) [Close](#)

To view any prior signed Medication Profiles, select **Signed Medication Profiles** and a window will pop up with a list of previously signed profiles. Select the printer icon to view and/or print the signed Medication Profile or select the **Edit** or **Delete** hyperlinks to make updates.

Signed Medication Profiles ABABA, JESS L...		
Signed By	Signed Date	Action
CJ Pierson RN	10/28/2021	 Edit Delete
Eric Stone RN	10/12/2021	 Edit Delete

Infectious Disease Profile

The Infectious Disease Profile is designed to help organizations easily track infectious diseases and screening tools used to detect them. Infectious disease screenings that have been completed are listed in the Infectious Disease Profile with the following details:

- Users who completed the screening
- Person screened and their name
- Type of screening completed
- Date of the screening
- Screening results

Search through the list of screenings by using the Filter by Text bar. Select the **View** hyperlink to display the results. Select the **Infection Log** button for a direct link to the Infection Log.

Screenings								
Filter by Text				Add COVID-19 Screening		Infection Log		
Entered By	Person Screened	Name of Person Screened	Type of Screening	Date of Screening	Risk Level	Screening Results	Temperature	Actions
Person, CJ RN	Client	ABIABA, JESS L.	COVID-19	10/28/2021	High	Yes-1/4 questions	98	View
Stone, Eric RN	Client	ABIABA, JESS L.	COVID-19	10/12/2021	Low	Yes-0/4 questions	98.6	View
Ndu, Sunday RN	Client	ABIABA, JESS L.	COVID-19	07/05/2021	High	Yes-1/4 questions	N/A	View

Select the **Add COVID-19 Screening** button to add a new screening. Complete the screening questions and assign a risk level based on your organization's policy, then select the **Save** button to complete or select the **Save & Add Another** button to document additional screenings.

COVID-19 Screening

Complete the following screening questions and select a risk level for the client and/or household members based on your organization's policies and procedures.

☒ Person Screened *
 ☐ Refused Screening

Based on state requirements and organizational policies, request the screened person's temperature before performing visits. Enter the reported temperature in Fahrenheit. The temperature you enter will populate in the Infectious Disease Screening report.

Reported Temperature (*F)
 Enter Temperature

Have you traveled internationally within the last 14 days to a country with sustained community transmission? *
☐ Yes ☐ No

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? *
☐ Yes ☐ No

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? *
☐ Yes ☐ No

Immunization Profile



There is a list of Inactive Immunizations in the bottom part of the window. To restore, select the **Reactivate** hyperlink. To add an Immunization, select the button in the top left, **Add Immunization**. Choose the Type, Administration Date and Administered By. Once completed, select the **Save & Close** button. Select **Save & Add Another** if more than one is being entered.



Allergy Profile



This pulls a list of all added allergies for the client. To add an allergy, select **Add Allergy**.



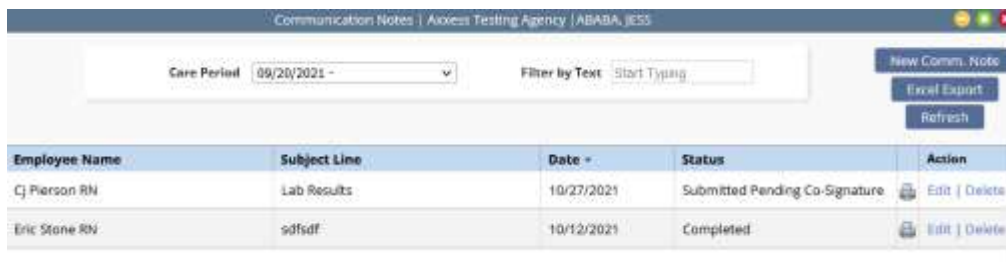
Type in the name of the allergy and the Type of allergy. Select **Save & Exit**, and the allergy will be added to the report. If there are additional allergies, select the **Save & Add Another** button.



Authorizations Listing

This report shows all current authorizations listed for the client. Authorizations are typically added by the Biller/Scheduler (Office Staff).

Communication Notes

This report will give a list of all the Communication Notes created for this client. The report will also show who created the note, the date and provide a PDF to view, print and/or download.



Employee Name	Subject Line	Date =	Status	Action
CJ Pierson RN	Lab Results	10/27/2021	Submitted Pending Co-Signature	 Edit Delete
Eric Stone RN	sdfsd	10/12/2021	Completed	 Edit Delete

Select the printer icon and a PDF document will generate with the ability to **Print** and/or **Download**:



Axxess Testing Agency 16000 Dallas Parkway Suite 700 DALLAS, TX 75248-9999 Phone: (214) 575-7711 Fax: (789) 797-7979		COMMUNICATION NOTE	
Client Name: Adams, Andy 4505 Belt Line Rd ADDISON, TX 75001-7000 (214) 575-7711		Physician: ABBOTT, NICOLE 9702 Stonestreet Rd #110 Louisville, KY 40272-0808 Phone: (502) 588-8600 Fax: (502) 588-8771 NPI: 1043587886	
MRN: 5454165143605 DOB: 01/02/1974			
Date: 07/27/2020			
Client is due to have labs drawn at Southwestern Medical Center 7/28/20			

Orders and Care Plans

This report will list out all the Orders and Care Plans for this client. This list is a quick way to view these orders when trying to locate a specific one. The list

provides the basic details of the orders with the ability to view, print and/or export the document:

Client Orders History

Date Range: 07/28/2021 - 10/28/2021

Excel Export

Order Number	Subject Line	Type	Status	Physician	Electronic	Order Date	Sent Date	Received Date	Actions
N/A	Life Skills Teaching		Not Yet Started		No	10/07/2021			 
N/A	Life Skills Teaching		Not Yet Started		No	10/05/2021			 
641413	Plan of Care-Testing		Not Yet Started	Ansari, Najmus	No	10/03/2021			 
622832	Physician Order		Saved	Ansari, Najmus	No	09/05/2021			 
N/A	AH HSA CAREPLAN		Reopened		No	08/18/2021			 
N/A	MSW Evaluation ce		To Be Sent To Physician	Ansari, Najmus	No	08/10/2021			 
586926	Non-OASIS Recertification		Saved	Ansari, Najmus	No	07/30/2021			 

Verify that this is the correct date range. Select the printer icon and a PDF document will appear with the ability to **Print** and/or **Download**:

AXXESS Testing Agency
19000 Dallas Parkway
Suite 100
DALLAS, TX 75248-9999
Phone: (214) 675-7711 | Fax: (214) 747-7878

Custom Care Plan

Client Name: AMORI, JUANITA MR: 11222 Visit Date: 07/20/2020
Care Period: 07/20/2020 - Open Time In: Time Out:
Associated Mileage: Surgeon: Physician:
DOB: 12/14/2001

Allergies

Vital Sign Parameters

☐ DNA

	SBP	DBP	HR	Resp	Temp	Weight
Greater Than						
Less Than						

Safety Precautions

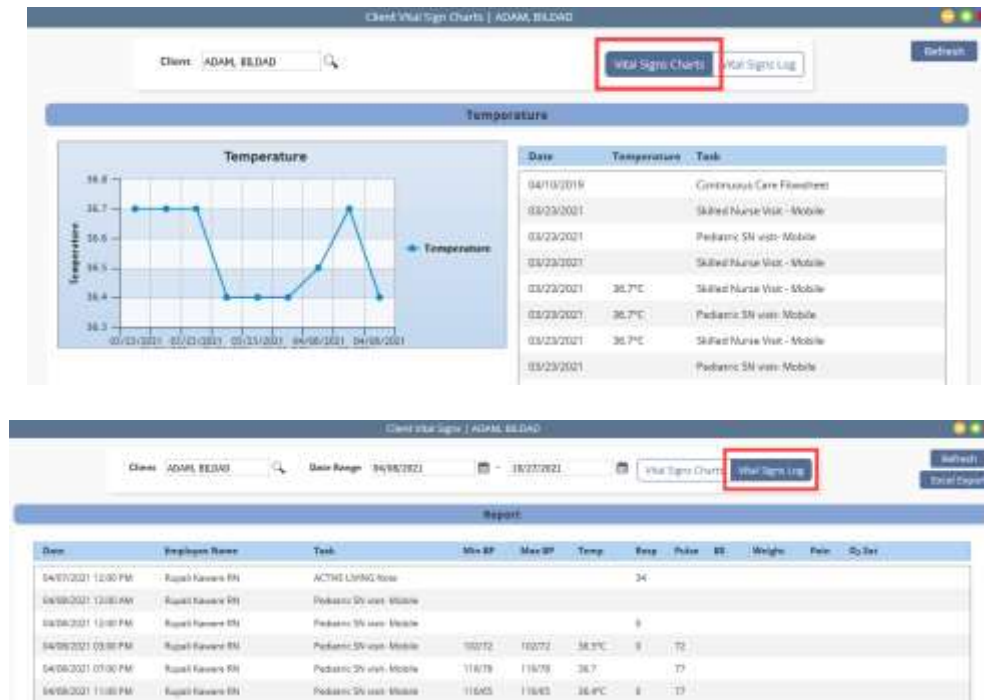
☐ DNA

<input type="checkbox"/> Anticoagulant Precautions	<input type="checkbox"/> Emergency Plan Developed	<input type="checkbox"/> Fall Precautions
<input type="checkbox"/> Keep Pathway Clear	<input type="checkbox"/> Keep Side Rails Up	<input type="checkbox"/> Neurologic Precautions
<input type="checkbox"/> Proper Position During Meals	<input type="checkbox"/> Safety in ADLs	<input type="checkbox"/> Seizure Precautions

Download Print Close

Vital Sign Charts

This report pulls a chart of all the prior vital signs documented on visits and a graphic view of their trends. There is also a Vital Signs Log that shows a summary list of all the three taken:



Seizure Records

This report shows all documented seizures by the client. New records can only be added inside of a visit. Select the icons to print, view or delete to listed Seizure Records.



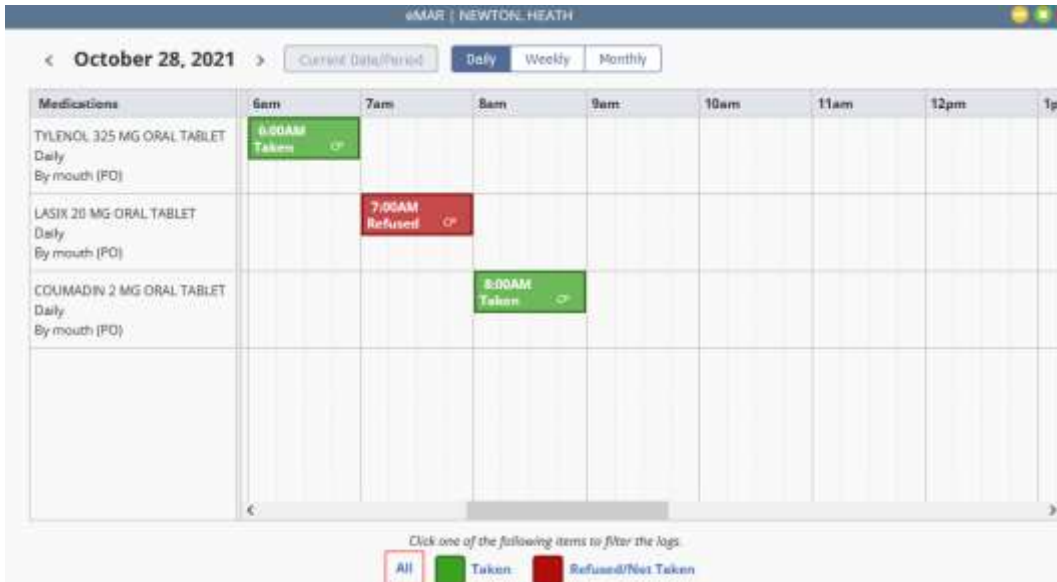
Seizure Record Data:

Start Date *	Task	Time	Duration	Post Seizure HR	Actions
10/27/2021	Skilled Nursing Visit	5:00 AM	0 min(s) 33 sec(s)	90	  


1 total results

eMAR Chart


This report shows records of medications that were taken or refused/not taken. The report can be viewed by day, week or month. Medications taken are displayed in green, and medications refused/not taken are in red.



Edit the medication log by hovering over the scheduled medication time and selecting the edit icon, or if it should not be there, select the trash icon to delete. To document a medication being taken that was not scheduled, select an empty square on the calendar. A new window will open. Enter the Log Time, whether it was taken, the Clinician, Clinician Initial and any comments. Select **Save & Close** when complete.



Vent Flow Sheet

This report will show a list of all tasks that included Ventilator documentation. Select , **Edit** or **Delete** to updated listed Ventilator Flow Sheets.



Ventilator Flow Sheets | Axxess Testing Agency | NEWTON, HEATHER

Task Date Range: 07/01/2020 - 10/25/2021

Filter by Text: Start Typing

Task	Task Date	Vent Type	Employee	Action
Vent Flowsheet	07/28/2020	Astrail	PIERSON, CJ	Edit Delete

I&O Logs

This report documents the input and output for clients. The report can be viewed by the summary or detailed view. Select **Refresh** to make the list up to date or select **Excel Export** to get an excel copy of the report.



I & O Logs Report | NEWTON, HEATH

Date Range: 08/28/2021 - 10/28/2021

Buttons: Refresh, Excel Export, Log Input Record, Log Output Record

Date	Total Input Amount	Total Output Amount	Variance	Action
10/25/2021	0	100.00	-100.00	View Details Edit/Delete Details
10/27/2021	130.00	100.00	30.00	View Details Edit/Delete Details
10/28/2021	30.00	40.00	-10.00	View Details Edit/Delete Details



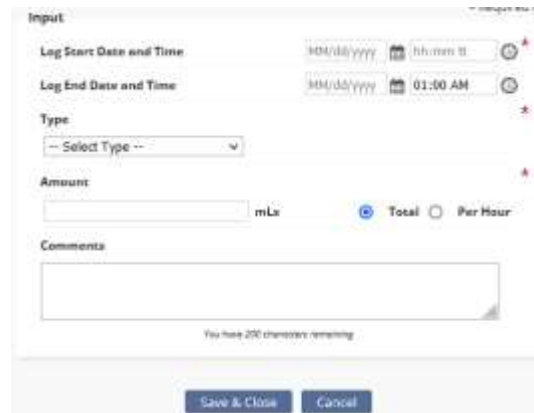
I & O Logs Report | NEWTON, HEATH

Date: 10/28/2021

Buttons: Refresh, Excel Export

Log Time	Input							Output				Total Output	Comments
	Oral	GT	NG	IV	Meds	Other	Total Input	Urinary	Stool	Vomit	Suction		
10/28/2021 07:00 AM	0	0	0	30.00	0	0	30.00	0	0	0	0	0	
10/28/2021 10:00 AM	0	0	0	0	0	0	0	0	0	40.00	0	40.00	
10/28/2021	0	0	0	30.00	0	0	30.00	0	0	40.00	0	40.00	

Select the **View Details** hyperlink to see specifics. Select the **Edit/Delete** hyperlink to make updates or remove them. Select **Log Input Record** to document any client input. A new window will open. Enter the Log Start Date and Time and Log End Date and Time. Choose the Type from the dropdown. Enter the amount and add any comments. Select **Save & Close** when complete. The output documentation is the same.



Input

Log Start Date and Time: MM/dd/yyyy HH:mm B

Log End Date and Time: MM/dd/yyyy 01:00 AM


Type: -- Select Type --


Amount: mL ☐ Total ☐ Per Hour

Comments:
 You have 200 characters remaining

Save & Close Cancel

Hospitalization Log

This report will show a list of any time the client was hospitalized. Select , **Edit** or **Delete** to listed hospitalization records.

Hospitalization Log NEWTON, HEATHER										
Source	In Date	End Date	Status	Last Home	User	Facility	Unit	Contact	Payment Sour	Action
User-Generated Transfer	07/28/2020		Hospitalize	07/28/2020	PIERSON, CJ	Memorial West	1a	DC Planner		Edit Delete 

Hospitalizations cannot be entered from here. They must be entered from *Client Center/Change Status*, and they will move from the active census to a status of Hospitalized.



NEWTON, HEATH 

Male, Age 88 - MRN: SAN1234

Physician: Octavius, Otto

DOB: 09/14/1930 Phone:
 SOC: 10/16/2018 Phone Type: Medical

[Change Photo] [Edit] [More] [Directions] [Admissions]

Refresh Schedule Activity **Change Status**

Triage Classification

This report will pull up a PDF version of the client's Emergency Preparedness Plan/Triage Classification based on what was answered during the assessment. Select the **Download** and/or **Print** button at the bottom to get a copy of the form.

Access Testing Agency 16000 N Dallas Pkwy #700N Dallas, TX 75248-1234 Phone: (111) 111-1111 Fax: (222) 222-2222		TRIAGE CLASSIFICATION	
Client: Boyle, Bruce 16000 Dallas Pkwy Dallas, TX 75248 Phone: (214) 555-1212 PhoneType: N/A	MRN: 006 Emergency Contact: BOYLE, CHRIS (214) 555-1212	DOB: 01/01/1930	
<input type="checkbox"/> 1. Life threatening (or potential) and requires ongoing medical treatment. When necessary, appropriate arrangements for evacuation to an acute care facility will be made. Unable to evacuate/ transport self. Unable to withstand any interruption in power supply. No readily available family or caregiver or family/ caregiver unable to provide needed care. Requires transport to an acute care facility or specialized shelter situation. Client is equipment-dependent e.g. equipment for life support e.g. patients dependent on Ventilator, LVAD. Client lives in the vicinity of the disaster and lives alone and has no family members. Client has no available transport. Notify EMS and Ambulance Company for transportation from the immediate area. Clients in this category who require ventilator may also need to be assessed for notification of the electric company upon admittance to services, to ensure continuity of electric power should the power fail.			
<input type="checkbox"/> 2. Not life threatening but would suffer severe adverse effects from interruption of services (i.e., daily insulin, IV medications, sterile wound care of a wound with a large amount of drainage.) Able to withstand up to 48 hour power interruption. Unable to transport self or no transportation available from caregiver. Examples are Oxygen-dependent clients with COPD, insulin dependent and unable to selfinject, large open draining wound with potential for sepsis, IV antibiotics. Clients with renal problems, heart failure or other very high risk clients who should be triaged quickly. Client services may be postponed for up to 48 hours without adverse effect to patient. If necessary, call the police or appropriate local authorities and give name and address of client.			
Download Print Close			

Client Service Goals

Client Service Goals

Newton, Heather (SAN1235) • Female
 16000 Dallas Pkwy, Dallas, TX • (214) 555-8889 • 09/14/1990

Active Discontinued

New Goal

Effective Date	Goal/Objective	Discontinuation Date	Actions
07/25/2020	Client will be able to take medications without caregiver prompting	Not Applicable	Discontinue
06/30/2020	Client will be able to complete basic ADL's on their own	Not Applicable	Discontinue

2 total results

Show 10 entries

By default, active client service goals appear on the Client Service Goals screen. To view discontinued goals, select the **Discontinued** tab in the top left. To add a service goal for the client, select the **New Goal** button in the top right corner of the screen.

Effective Date	Goal/Objective	Discontinuation Date	Actions
MM/DD/YYYY		MM/DD/YYYY	Save Cancel

Enter the Effective Date and Goal/Objective for the client. Select the **Save** button to add the goal to the client's goal list. Select the **Discontinue** hyperlink to end a goal.

Effective Date	Goal/Objective	Discontinuation Date	Actions
07/25/2020	Client will be able to take medications without caregiver prompting	Not Applicable	Discontinue In Progress

Discontinue Date*

Reason*

Discontinue
Discontinue & Copy
Cancel

Enter the Discontinue Date and choose a Reason for the discontinuation from the drop-down menu. Selecting the **Discontinue** button moves the goal to the discontinued list. **Discontinue & Copy** discontinues the goal but copies the goal text into a new goal for editing. **Cancel** stops the discontinue action.

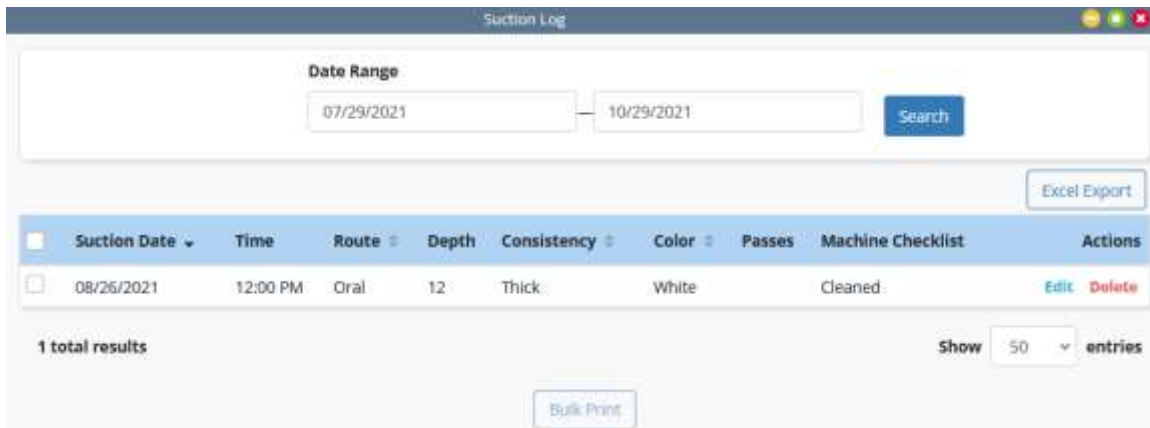
Supply Log

The Supply Log quick report displays each supply worksheet addendum completed for the client. At the top of the report screen, search by name or enter a date range to display supply worksheet addenda completed within a specific time frame. The date range is limited to three months. Below the date range filter, users can view all supply worksheet addenda completed in the selected time frame. Depending on permissions, users can edit and/or delete addenda using the hyperlinks in the Actions column.

Supply Worksheet					
07/29/2021 — 10/29/2021		Search by Text...	Search	Excel Export	
Description	Quantity Used	Date Used	Employee	Actions	
Negative pressure ventilator; portable or stationary	1	10/28/2021	CJ Pierson RN	Edit	Delete
Battery charger; replacement for patient-owned ventilator	1	10/28/2021	CJ Pierson RN	Edit	Delete
Incontinence Garment, any type, (e.g. brief, diaper), each	50	10/27/2021	CJ Pierson RN	Edit	Delete
Walker, enclosed, four-sided framed, rigid or folding, wheeled with posterior seat	1	10/26/2021	CJ Pierson RN	Edit	Delete
4 total results			Show	50	entries

Suction Log

The Suction Log quick report displays each suction log addendum completed for the client. At the top of the report screen, enter a date range to display suction log addenda completed within a specific time frame. The date range is limited to three months. Below the date range filter, users can view all suction log addenda completed in the selected time frame. Depending on permissions, users can edit and/or delete addenda using the hyperlinks in the Actions column.



The screenshot shows the 'Suction Log' window. At the top, there is a 'Date Range' section with two input fields: '07/29/2021' and '10/29/2021', followed by a 'Search' button. Below this is an 'Excel Export' button. The main part of the window is a table with the following columns: Suction Date, Time, Route, Depth, Consistency, Color, Passes, Machine Checklist, and Actions. A single row of data is visible, dated 08/26/2021 at 12:00 PM, with an Oral route, Depth of 12, Thick consistency, White color, and a Cleaned machine checklist. The Actions column for this row contains 'Edit' and 'Delete' links. Below the table, it says '1 total results'. On the right, there is a 'Show' dropdown set to '50' and the word 'entries'. At the bottom center, there is a 'Bulk Print' button.

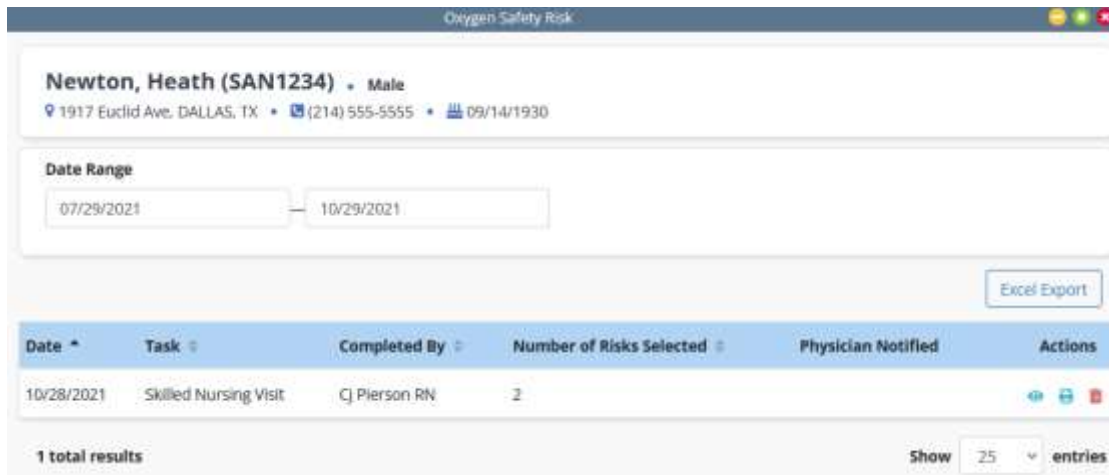
Oxygen Safety Risk

This quick report consolidates and displays oxygen risk addenda completed for clients who require oxygen. To enable the Oxygen Safety Risk quick report, users must identify a client's need for oxygen in the client's profile. To identify a client's need for oxygen, edit the client's profile and navigate to the **Medical Information** tab. In the Oxygen section, check the box next to "Click here if the client requires oxygen." Select **Save** to finish identifying the client's need for oxygen.



The screenshot shows the 'Edit Client | NEWTON, HEATH' window. On the left is a sidebar with navigation links: Information, Billing Details, Medical Information (which is highlighted), Conditions of Participation, Requirements, and Client Contacts. The main area is titled 'Oxygen' and contains a checkbox with the text 'Click here if client requires oxygen.' which is currently checked. Below this is a 'Note' that says 'Click on the save button to update the oxygen setting.'

Once the client's need for oxygen has been designated in the client's profile, users can navigate to the Oxygen Safety Risk quick report to view each oxygen risk addendum completed for the client.



Oxygen Safety Risk

Newton, Heath (SAN1234) • Male
 1917 Euclid Ave. DALLAS, TX • (214) 555-5555 • 09/14/1930

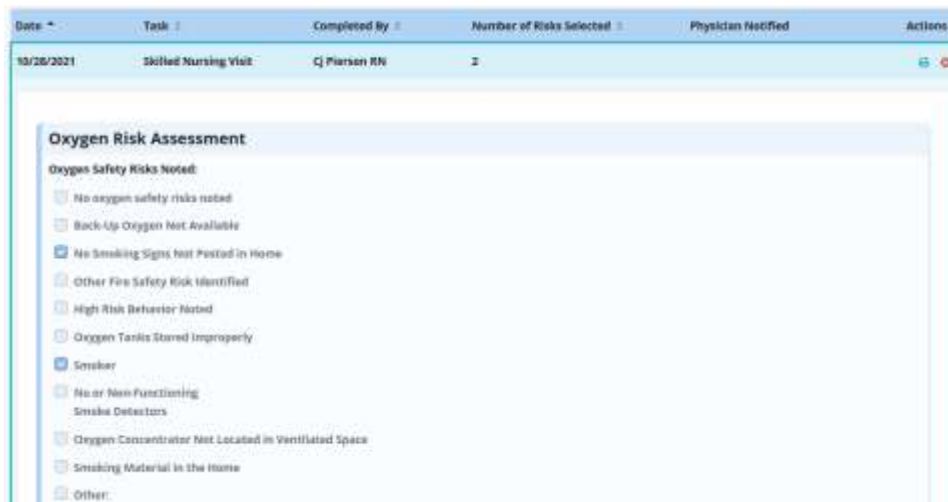
Date Range
 07/29/2021 — 10/29/2021

Excel Export

Date	Task	Completed By	Number of Risks Selected	Physician Notified	Actions
10/28/2021	Skilled Nursing Visit	CJ Pierson RN	2		

1 total results Show 25 entries

At the top of the report screen, enter a date range to display oxygen risk addenda completed within a specific time frame. The date range is limited to three months. Below the date range filter, users can view all oxygen risk addenda completed in the selected time frame. Depending on permissions, users can view, print and/or delete addenda using the icons in the Actions column.



Oxygen Risk Assessment

Oxygen Safety Risks Noted:

- ☐ No oxygen safety risks noted
- ☐ Back-Up Oxygen Not Available
- ☒ No Smoking Signs Not Posted in Home
- ☐ Other Fire Safety Risk Identified
- ☐ High Risk Behavior Noted
- ☐ Oxygen Tanks Stored Improperly
- ☒ Smoker
- ☐ No or Non-Functioning Smoke Detectors
- ☐ Oxygen Concentrator Not Located in Ventilated Space
- ☐ Smoking Material in the Home
- ☐ Other:

Fall Risk

The Fall Risk quick report displays each fall risk addendum completed for the client. At the top of the report screen, enter a date range to display fall risk addenda completed within a specific time frame. The date range is limited to three months. Below the date range filter, users can view all fall risk addenda completed in the selected time frame. Depending on permissions, users can view, print and/or delete addenda using the icons in the Actions column.




Fall Risk Assessment

Date Range
 —

Date	Task	Complete by	Fall Risk Total	Actions
10/28/2021	Skilled Nursing Visit	CJ Pierson RN	4	  

1 total results Show 50 entries

To view the answers selected in an assessment, select the view icon.

Date	Task	Complete by	Fall Risk Total	Actions
10/28/2021	Skilled Nursing Visit	CJ Pierson RN	4	  

Fall Risk Assessment

Select the applicable fall risks based on your assessment of the client. For each risk selected, one point will be added to the client's fall risk score.

Fall Risk Total

Fall Risk Assessment

- ☒ Age 65+
- ☒ Three or More Co-Existing Diagnoses: Assess for hypotension
- ☒ Prior History of Falls Within Three Months: Fall is defined as an unintentional change in position resulting in coming to rest on the ground or at a lower level
- ☒ Incontinence: Inability to make it to the bathroom or commode in a timely manner. Includes frequency, urgency and/or nocturia
- ☐ Visual Impairment: Includes macular degeneration, diabetic retinopathies, visual field loss, age-related changes and/or decline in visual acuity, accommodation, glare tolerance, depth perception or night vision. Includes abstaining from the use of prescribed lenses or lack of access to the correct prescription
- ☐ Impaired Functional Mobility: May include clients who need help with IADLs/ADLs or have gait or transfer problems, arthritis, pain, fear of falling, foot problems, impaired sensation, impaired coordination or improper use of assistive devices
- ☐ Environmental Hazards: May include poor illumination, equipment tubing, inappropriate footwear, pets, hard-to-reach items, uneven or cluttered floor surfaces or outdoor entry and exits

Deleted Tasks/Documents

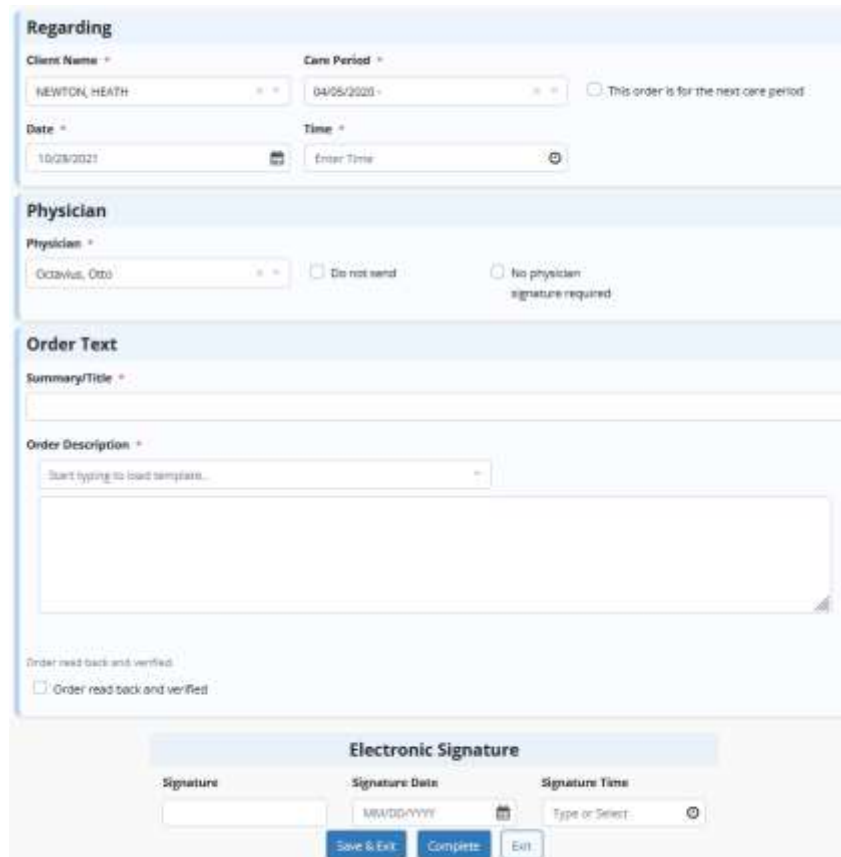
See *Deleting a Task* below

CLIENT CHART TABS

CREATE

Order

Client Center/Create/Order

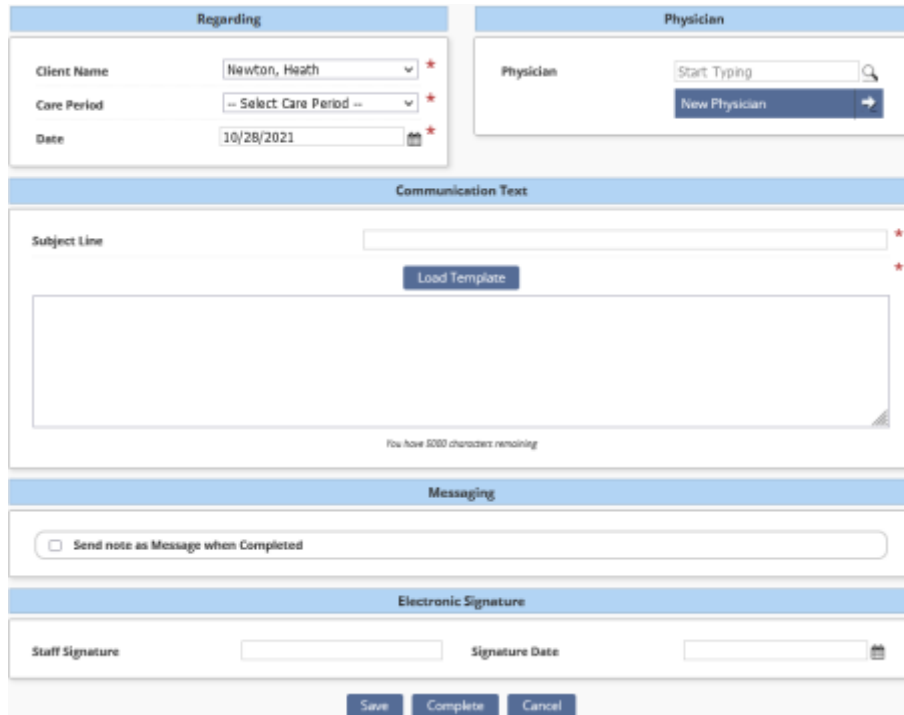


The screenshot shows the AXXESS order entry interface. It is divided into several sections: 'Regarding' (Client Name, Care Period, Date, Time, and a checkbox for 'This order is for the next care period'), 'Physician' (Physician name, 'Do not send' checkbox, and 'No physician signature required' checkbox), 'Order Text' (Summary/Title and Order Description fields), and 'Electronic Signature' (Signature, Signature Date, Signature Time, and buttons for 'Save & Exit', 'Complete', and 'Exit').

- Client Name - Will auto-fill in the designated field.
- Care Period - Will auto-fill in the designated field.
- Order is for next Care Period - Check this box if the order will go to the next Care Period.
- Date - The date will default to today's date but can be changed if necessary.
- Time – Enter time of order.
- Physician - Will auto-fill in the designated field. Locate a different physician that will be signing order by starting to type name. Indicate whether order should not be sent or whether no signature required.
- Summary/Title - Give this order a title.
- Order Description - Enter text given for order. Option available to **Load Template**.
- Read Back - Indicate if the Order has been read back by selecting the check box.
- Enter Signature, Date and Time. Select **Save & Exit** to return later or select **Complete** when finished.

Communication Note

Client Center/Create/Communication Note



The screenshot shows the 'Communication Note' form in the Axxess system. It is divided into several sections:

- Regarding:** Contains fields for 'Client Name' (filled with 'Newton, Heath'), 'Care Period' (a dropdown menu showing '-- Select Care Period --'), and 'Date' (filled with '10/28/2021').
- Physician:** Contains a 'Physician' field with a search icon and a 'New Physician' button.
- Communication Text:** Contains a 'Subject Line' field, a 'Load Template' button, and a large text area for the note. A character count at the bottom indicates 'You have 1000 characters remaining'.
- Messaging:** Contains a checkbox labeled 'Send note as Message when Completed'.
- Electronic Signature:** Contains fields for 'Staff Signature' and 'Signature Date'.

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

- Client's Name - Auto Filled.
- Care Period - Select the drop-down to select the care period assigned.
- Date - Defaults to today's date but can be changed.
- Physician - Start typing in the physician's name, and a drop-down box appears. If the physician is not currently in Axxess, select **New Physician** to enter the name.
- Subject Line/free text - This is the area where the title and communication note is written - either free text or select one of the organization's templates.
- Send note as Message - Check this box to send the note as a message to other users in the organization.
- Electronic Signature – Enter Staff Signature and Signature Date.
- Select **Save** to complete later or select **Complete** when finished.

Authorization

Client Center/Create/Authorization

Detail

Client Name: * Authorized Tasks: *

Start Date: * Status: *

End Date: * Authorization Number:

Select a Client, Start Date, and End Date in order to populate this list.

Payment Source: *

Units

Units: * Select the days the authorization is limited to. Not selecting any days is the same as selecting all days, and would allow services to be performed on any day of the week.

Unit Type: * Days authorization restricted to: *

Frequency of Units: * Total Units:

Comments

You have 2000 characters remaining

Attachments

Use the upload fields below to upload files associated with this authorization.

No file selected. No file selected. No file selected.

- Client's Name - Auto Filled.
- Start & End Date - Enter the date range of the authorization.
- Authorized Tasks - Indicate which tasks will be covered by the authorization by checking specific boxes or select **Check all** to select all boxes/tasks.
- Payment Source - Select payment source from the drop-down menu.
- Status - Indicate whether the authorization is Active, Pending, Closed or Denied.
- Units - Enter how many units were authorized for this client.
- Unit Type - Choose between Per Hour, Per Visit or Per 15 min block.
- Frequency of Units - How often are the units used.
- Total Units - Enter or select **Calculate Total** for the number to be generated.
- Enter any Comments or attach any documents related to authorization. Select **Save** when complete.

View

Select the **View** tab to see any of the Quick Reports listed in the top right of the Client Center.

Schedule Activity

Client Center/Schedule/Schedule Activity

Select **Schedule Activity** to be taken to the Schedule Center already filtered for the client. See *Schedule Center* below.

New Document

Client Center/Documents/New Document

To add any documents/attachments to the client's chart, select **New Document**. A new window will open for a new document. Select **Browse...** to find a file saved on the computer and choose the Document Name. Then select **Upload**.



The image shows a 'New Document' dialog box. It has a title bar that says 'New Document' and a close button. Inside, there's a 'Client' field with 'NEWTON, HEATH' selected. Below that is a 'Document Name' field with a dropdown menu showing 'Select Name...'. At the bottom, there's a 'New Document' section with a 'Browse...' button and the text 'No file selected.'. At the very bottom, there are 'Upload' and 'Cancel' buttons.

View Documents

Client Center/Documents/View Documents

Documents that have been uploaded will display. Select the **Edit** or **Delete** hyperlink to make updates. Select the **File Name** to open or save a copy of the document. To upload a document, select the **Add Document** button.



The image shows a 'View Documents' table. At the top, there's a title bar 'Client Documents List | NEWTON, HEATH'. Below it, there's a search bar 'Filter by Text' with 'Start Typing' and an 'Add Document' button. Below the search bar is a table with columns: Document Name, File Name, Created, Modified, and Action. There are two rows of data: 'Labs' and 'Admission Records I'. Each row has a corresponding 'File Name' and 'Created' date. The 'Action' column has links for 'Edit' and 'Delete'.

Document Name	File Name	Created	Modified	Action
Labs	NEWTON Lab Results 102621.docx	10/28/2021	10/28/2021	Edit Delete
Admission Records I	NEWTON Adm. Records 102621.docx	10/28/2021	10/28/2021	Edit Delete

SCHEDULE CENTER

Client Center/Schedule Activity or Schedule/Schedule Center



Schedule Center | Axxess Testing Agency

Client: Employee: New Care Period Task Manager Matching Visit Log View Authorization(s) More

ABABA, JESS L (GDS11192030) • Female Care Period: 09/20/2021 to 09/20/2021

16000 Dallas Parkway Nbl, Dallas, TX • (866) 795-5990 • 03/12/1980

October 2021 Today Month Week Day

Tasks: MSW Evaluation, Custom Visit - Mobile, Infusion Initial, Life Skills 2, Continuous Care Plan, Physician order, Skilled Nursing Visit, High Care Plan, PAS Note - Mobile, Custom Care Plan, Skilled Nursing Visit, Pediatric SN Note.

The left column provides the ability to view client and employee calendars/schedules. The default search is by Client. Selecting Employee updates the criteria and results to employee. The Schedule Center has a list of menus located at the top of the screen that prepare and manage the client's schedule.



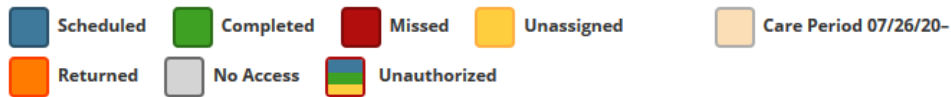
Schedule Center | Axxess Testing Agency

New Care Period Task Manager Matching Visit Log View Authorization(s) Unassigned Shifts Schedule Summary

The calendar defaults to a month view of the current month. View by calendar or select the **List Tasks** button in the top right or the **List Tasks** tab in the bottom right to see tasks stacked in a grid. Select the **Hide List** tab to get back to the calendar view.

Task	A	Payment Source	Start Time	End Time	Employee	Status	Action
MSW Evaluation		Bob's Invoice	09/27/21 1:00 AM	09/27/21 2:00 AM	Wendy Amerson RN	Missed Visit(Complete)	
Custom Visit - Mobile		Bob's Invoice	09/28/2021	09/28/2021	Shivetha Lathi RN	Not Yet Started	
Infusion Initial		Bob's Invoice	09/29/21 2:00 AM	09/29/21 3:00 AM	Akiyuki Kato RN	Not Yet Started	
Life Skills 2		Bob's Invoice	09/30/2021	09/30/2021	Akiyuki Kato RN	Not Yet Started	
Continuous Care Plan/Worksheet		Bob's Invoice	09/30/21 9:00 AM	09/30/21 1:00 PM	Eric Stone RN	Not Yet Started	
Infusion Initial		Bob's Invoice	10/01/21 6:00 AM	10/01/21 7:00 AM	Reymart Casas RN	Not Yet Started	

Tasks are shown in color that corresponds to the status of the task. The following is the color legend:



SCHEDULING A TASK (PERMISSIONS BASED)

Schedule Center/New/Client Task or select any free space on desired time of task.

< October 2021 >							Today	Month	Week	Day			List Tasks
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday							
12:00AM - 1:00AM Adrienne HHA Note Allyson Rios RN	6:00AM - 7:00AM Infusion Initial Neymar Costa RN	12:15AM - 1:15AM MSW Evaluation Jan Sedgwick	Skilled Nursing Visit Cindy Howell RN 6:00AM - 7:00AM Infusions Initial Neymar Costa RN	6:00AM - 7:00AM Infusion Initial Neymar Costa RN	Physician order Rupal Kaware RN 0880 888-8888	12:00AM - 12:01AM 24 hour visit note Rupal Kaware RN 0880 888-8888							
10	11	12	13	14	15	16							
Physician order Rupal Kaware RN 0880 888-8888	Kim PT Re-Eval Allyson Rios RN	12:00AM - 2:15AM SDC Visit Allyson Rios RN	Custom Care Plan Rupal Kaware RN 0880 888-8888	Skilled Nursing Visit Rita Stone RN	Pediatric SN Note Heather Portals RN								
12:00AM - 12:01AM AH HHA NOTE Rupal Kaware RN 0880 888-8888	Skilled Nursing Visit Cindy Howell RN	HHA Care Plan Cindy Howell RN	12:00AM - 12:01AM Skilled Nursing Visit Amanda Dornell RN	HHA Care Plan Rupal Kaware RN 0880 888-8888	12:00AM - 1:00AM Custom Care Note Rupal Kaware RN 0880 888-8888								
17	18	19	20	21	22	23							
12:00AM - 1:00AM OT Evaluation Rupal Kaware RN 0880 888-8888	Annex Custom Care PT Rupal Kaware RN 0880 888-8888	10:00AM - 4:00PM home health aide visit Unassigned	Physician Order RK - G Rupal Kaware RN 0880 888-8888	12:00AM - 1:00AM 24 hour visit note Allyson Rios RN	Nutritional Assessment Tanya Chisholm RN 0880 785-9414	10:00AM - 4:00PM home health aide visit Unassigned							
12:00AM - 1:00AM PT Pediatric Evaluation Rupal Kaware RN 0880 888-8888	10:00AM - 4:00PM home health aide visit Unassigned	2:00PM - 4:00PM Homemaker Visit Jan Sedgwick	10:00AM - 4:00PM home health aide visit Amanda Dornell RN	10:00AM - 4:00PM home health aide visit Unassigned	10:00AM - 4:00PM home health aide visit Tanya Malachuk RN								
24	25	26	27	28	29	30							
10:00AM - 4:00PM home health aide visit Unassigned	10:00AM - 4:00PM home health aide visit CJ Pearson RN	Physician order Rupal Kaware RN 0880 888-8888	5:00AM - 6:00AM Skilled Nurse Visit - M CJ Pearson RN	FS	FS	FREE SPACE							

Choose a Shift Length and whether to Override Shift Length or Schedule without Time by selecting the checkboxes. Enter the From and to date and time. Choose the Payment Source, Task, Recurrence and the Caregiver/Employee completing the task. There is an optional Comments box with a 1,000-character limit. Select **Save & Close** for adding a single task and select **Save & Add Another** if there is more than one.



Employee Scheduler

Client: ABABA, JESS L.

Shift Length: 1 hours

☐ Override Shift Length ☐ Schedule without Time

From: 10/28/2021 11:00am tt

To: 10/28/2021 11:00am tt

Payment Source: - Select a Start and End Time -

Task: - Select Task -

Recurrence: None

Caregiver/Employee: Filter by 1 selected

Unassigned

[Find a Match](#)

Comments

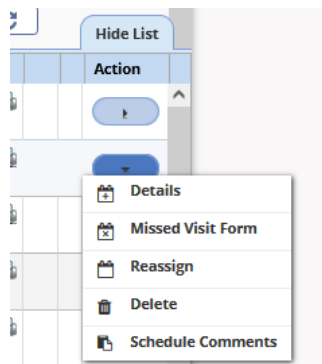
You have 1000 characters remaining

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

After adding a task, hover over the task in the Schedule Center for more options. Depending on the status of the visit, there are options to Document, Print, Missed Visit Form, Edit Scheduled Date/Time, Reassign, Restore, Delete or view Quick Details.



Task Details: In the List Tasks view on the right-hand side of the screen (under the Action column) will be a Menu drop-down option Details for all tasks (permissions based).



The window will open, displaying the details of the task. Make edits to the task, add comments, add attachments, add supplies or view the Activity Log. Select **Save** to keep any updates.

Details

Client

ABABA, JESS L.

Care Period

09/20/2021 - Open

MRN

GD511192030

Task

Skilled Nursing Visit

Load Matching Task Documents

Status

Not Yet Started

Scheduled Start Time

10/04/2021

Assigned To

Eric Stone RN

Reassign Task

Scheduled End Time

10/04/2021

Surcharge

\$

Actual Visit Date/Time In

10/04/2021

12:00 AM

Associated Mileage

Actual Visit Date/Time Out

10/04/2021

12:01 AM

Travel Time

mins

Schedule without Time

Payer

Private (Self) Pay

Load Payers

Billable

Payroll Details

Payable	Start Date	Start Time	End Date	End Time	Units	Rate	Rate Type	Paid	Actions
<input checked="" type="checkbox"/>	10/04/2021	12:00 AM	10/04/2021	12:01 AM	0	\$0.00	None Specified	No	

Gross Profit Forecast

Billing Amount	\$0.00	Payroll Amount	\$0.00
Gross Profit Percentage	0%		

Supply

Supply Worksheet

Comments

Yellow Sticky Note

Return Reason

Orange Sticky Note

View Comments

Attachments

There are 0 attachment(s)

Use the upload fields below to upload files associated with this scheduled task.

Browse...

No file selected.

Browse...

No file selected.

Browse...

No file selected.

Save

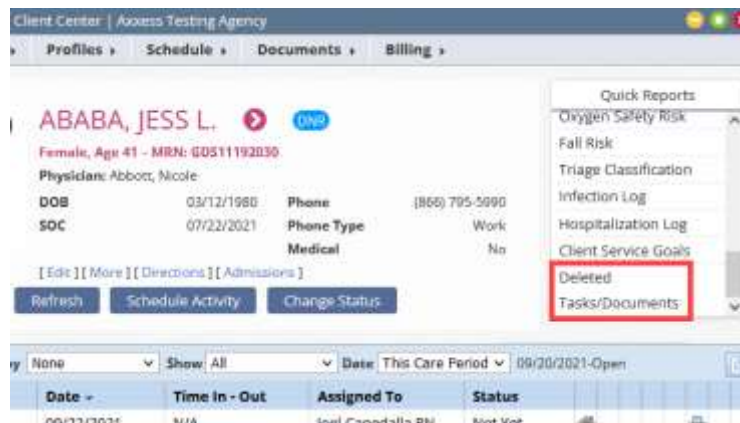
Close

DELETING A TASK (PERMISSIONS BASED)

Hover over a task and select the trash icon or (from the Task List view) go to the Menu drop-down and select **Delete** to remove a task. The confirmation below will appear:



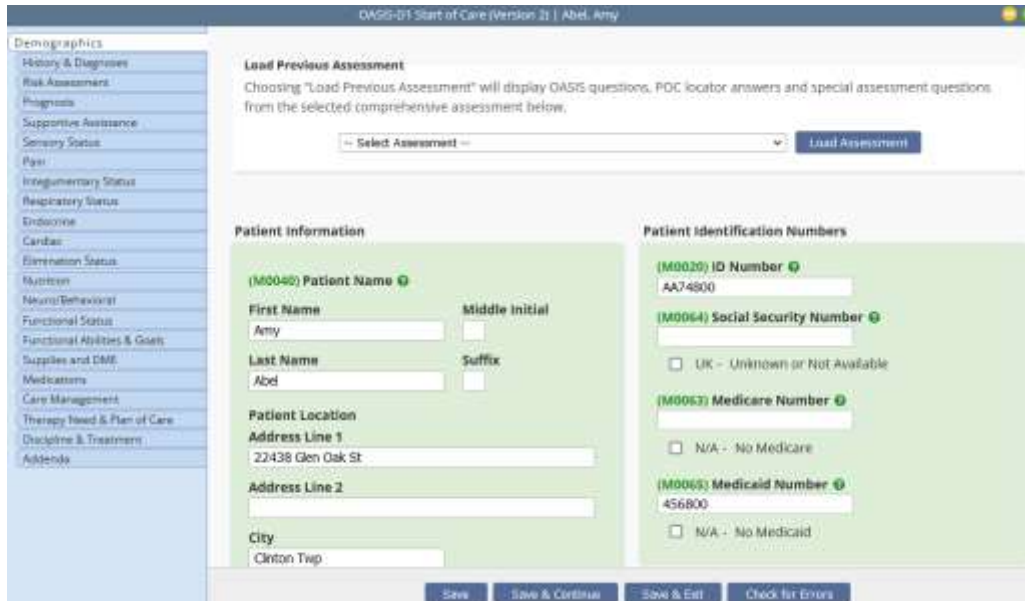
Select **Yes** and the task will be deleted, but still stored in the “Deleted Tasks/Documents” in the Clients Chart. Select the **Restore** hyperlink to reactivate.



Client Deleted Tasks/Documents History ABABA, JESS L.					
Filter by Text <input type="text" value="Start Typing"/>					
					Refresh
Task/Document	Scheduled Time	Actual Time	Status	User	Action
Nutritional Assessment Form	11/22/2021 12:30 PM	11/22/2021 12:30 PM	Not Yet Due	Lorna Symonds RN	Restore
Homemaker Visit	10/19/2021 04:00 PM	10/19/2021 04:00 PM	Not Yet Started	Jan Sedayao	Restore
Homemaker Visit	10/19/2021 02:00 PM	10/19/2021 02:00 PM	Not Yet Started	Jan Sedayao	Restore
24 hour visit note	10/16/2021	10/16/2021	Not Yet Started	Rupali Kaware RN	Restore
Initial Pediatric Assessment-Training	10/16/2021	10/16/2021	Not Yet Started	Ladawn Pierce RN	Restore
AH HHA NOTE	10/14/2021 12:00 AM	10/14/2021 12:00 AM	Not Yet Started	Rupali Kaware RN	Restore
24 hour visit note	10/09/2021	10/09/2021	Submitted Pending Co-	Rupali Kaware RN	Restore


OASIS-D1 START OF CARE


When charting information in the Start of Care (SOC) visit, some information has already pulled in from the client's profile. Make sure all required questions get filled in the rest of the visit. This will be indicated by red asterisks.




- **Green Boxes** - Information in the Green boxes are the M questions that will be exported to CMS. At the end of the OASIS, select **Check for Errors** and the system will make sure all OASIS questions are answered and not conflicting.
- **Grey Boxes** - These questions will pull to the Plan of Care (sent to physician for signature).
- **Cream Boxes** - Physical Assessment questions.

When all information is complete, select the **Check for Errors** button. A window will open showing any warnings or errors.



Warnings will have a yellow triangle  icon. This message is the software letting users know of things they may want to look at before submitting the

OASIS and is not a hard stop. A fatal error will be a red stop  icon. This message is the system letting users know this question either needed to be answered or answered differently. Users cannot finish this OASIS with red error messages. Confirm the HIPPS Code, OASIS Claim Matching Key, and HHRG scores all have a code. These codes are going to affect billing, so they should not be blank.

YOU HAVE 0 ERRORS AND 0 WARNINGS

None
No Errors, No Questions - Congratulations!

OASIS Information:

HIPPS Code: 18FKS HHRG Code: C2F151
OASIS Claim Matching Key: 21KY21KY11CADAADA

Signature:

Time In: 10/12/2021 07:00 AM Time Out: 10/12/2021 08:00 AM
Clinician Signature: * Date: * Time: *

OASIS Scrubber OASIS File Return to OASIS Complete

Before finishing the OASIS, users can run the **OASIS Scrubber** by selecting the red button in the bottom left. Axxess has integration in place with SHP for OASIS Audits. This will look for any inconsistencies or flags that the organization may want to address. These audits are not necessarily wrong, the scrubber is looking for inconsistencies.

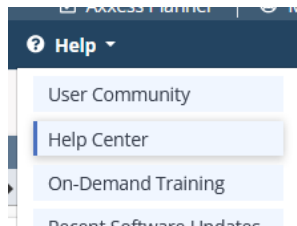
Axxess Testing Agency 10000 Dallas Parkway suite 700 DALLAS, TX, 75240-0900 Phone: (214) 575-7711 Fax: (789) 797-7979	OASIS-D1 Start of Care Audit Logical and Clinical Inconsistency Check
Home Health Gold Edit Report	
Client Name: Newton, Heather MR: SAN1235 OASIS-D1 Start of Care assessed on 07/26/2020	
Clinical 79404C Inconsistency Flag (79404C) - The following may be inconsistent: (M1240) Formal Pain Assessment Conducted = 2 - Yes, indicates severe pain (M1720) When Anxious = 0 - None of the time	
Clinical 52114C Inconsistency Flag (52114C) - The following may be inconsistent: (M1240) Formal Pain Assessment Conducted = 2 - Yes, indicates severe pain (M1860) Ambulation = 1 - With the use of a one-handed device	
Clinical 92885C Inconsistency Flag (92885C) - The following may not be in accordance with agency policy. (M1028) Active Diagnoses 2 - Diabetes Mellitus (DM) = (NOT ASSESSED) CMS anticipates that (-) Not Assessed will be a rarely used response.	

After all audits have been addressed, make sure the Time In and Time Out is filled out. Then enter the signature, date, and select **Complete**. Once the OASIS is finished, it will be sent to the QA Center for approval.

HELP CENTER

Help/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 of all of Axxess' products. It can be accessed by going to:



Or also available at <https://www.axxess.com/help/>

