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.

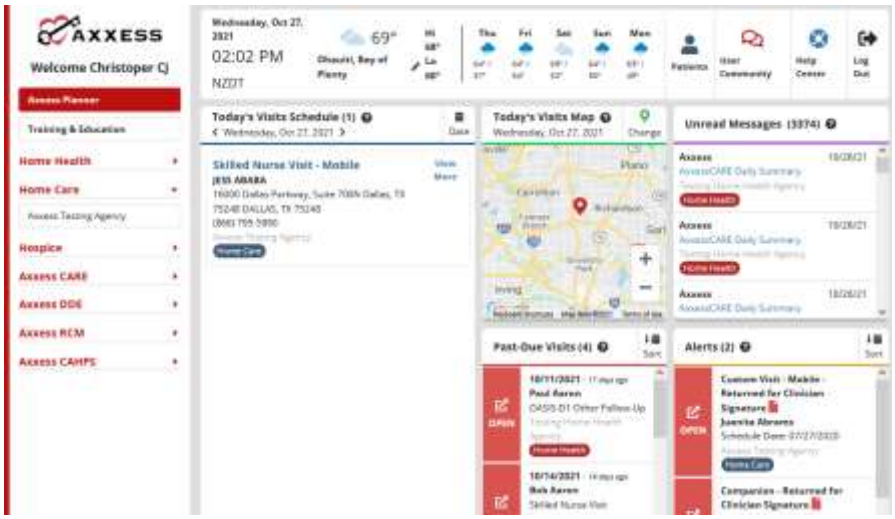
Enter the username and password then select **Secure Login**.

The 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



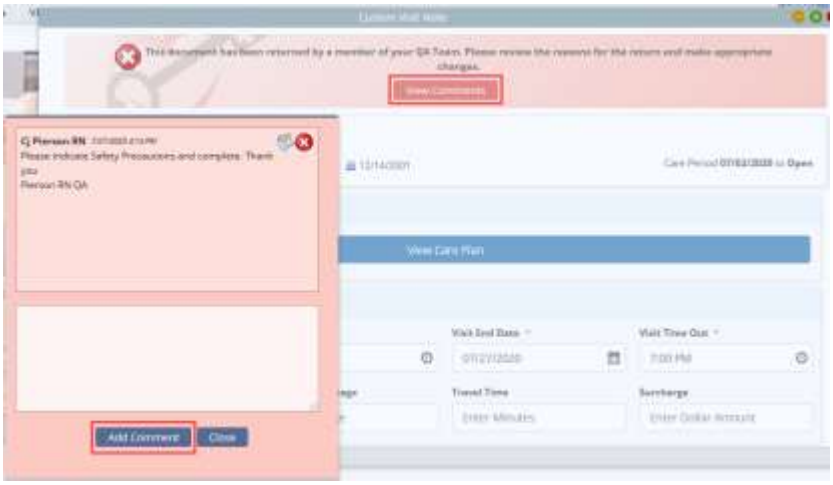
- Date/Time/Weather - Today's date, time and five-day weather forecast for the user's specific area.
- Today's Visits Schedule - Calendar that shows the user's visit schedule (red dots on the dates the user has visits).
    - Selecting the day will bring up the tasks schedule. Selecting the Task will 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.

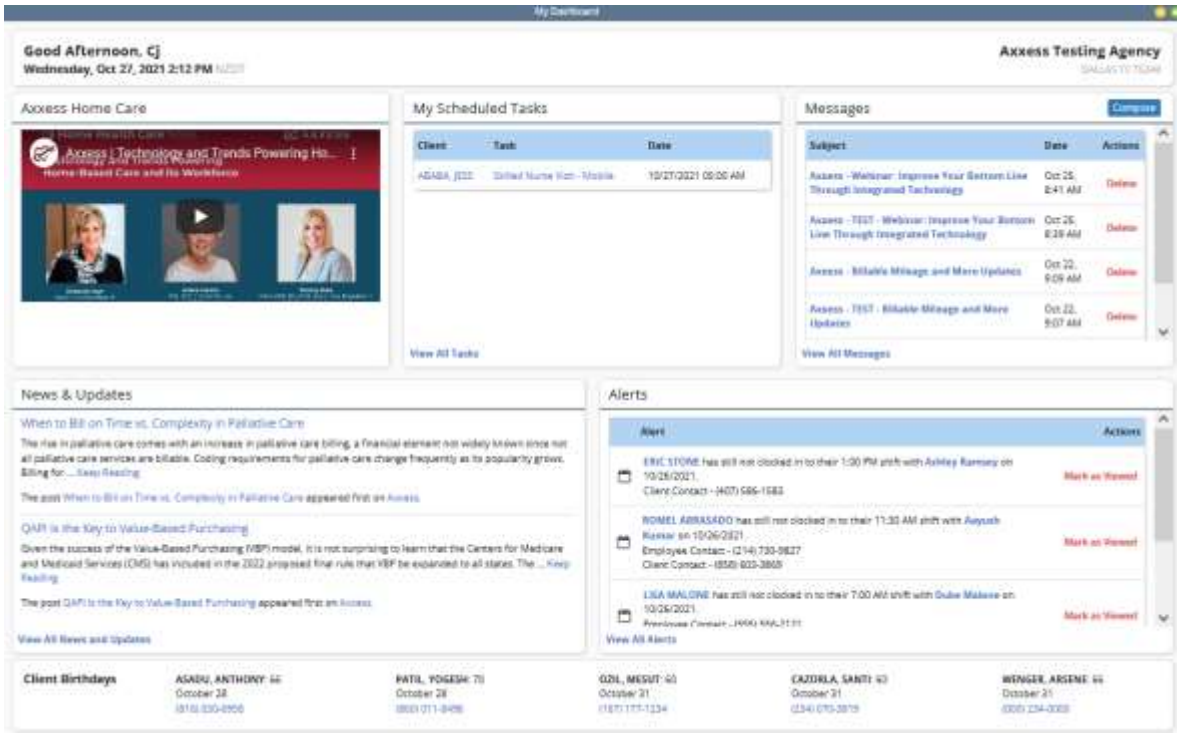
- Unread Messages - A list of unread messages from the Internal Messaging Center. Selecting a message will take the user directly to the messaging center.
- Past-Due Visits - A list of visits from the last 21 days that have not been completed and signed.
    - Selecting the red **OPEN** tab on the left-hand 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

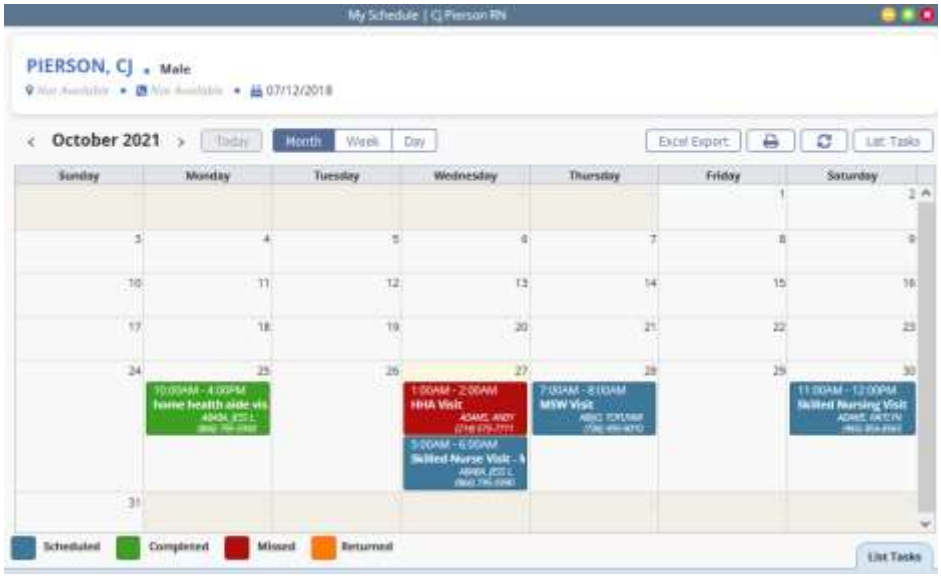
Opens upon log in. Below are the six tiles for all clinicians:



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.



- 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:

Scheduled Completed Missed Returned

Hovering over a task will give the following options:

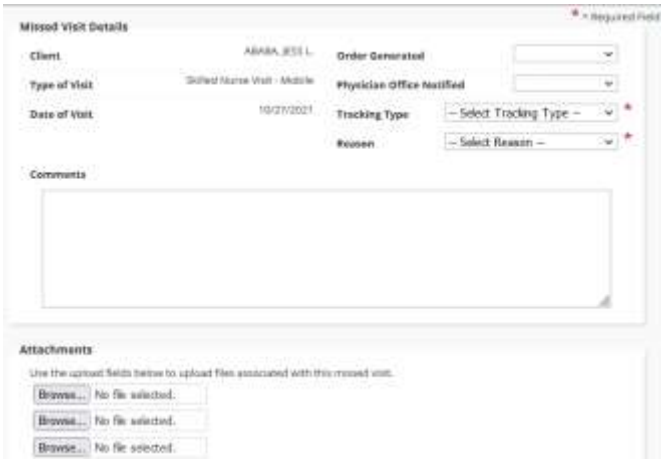
- Edit Document - Jumps straight into documentation for the client.
- Print - Displays the print view of the document. From here, the document may be downloaded or printed.
- Missed Visit Form - *see below.*
- Edit Scheduled Date/Time - Update the date and time of the task.
- Reassign - Assign the task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

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.

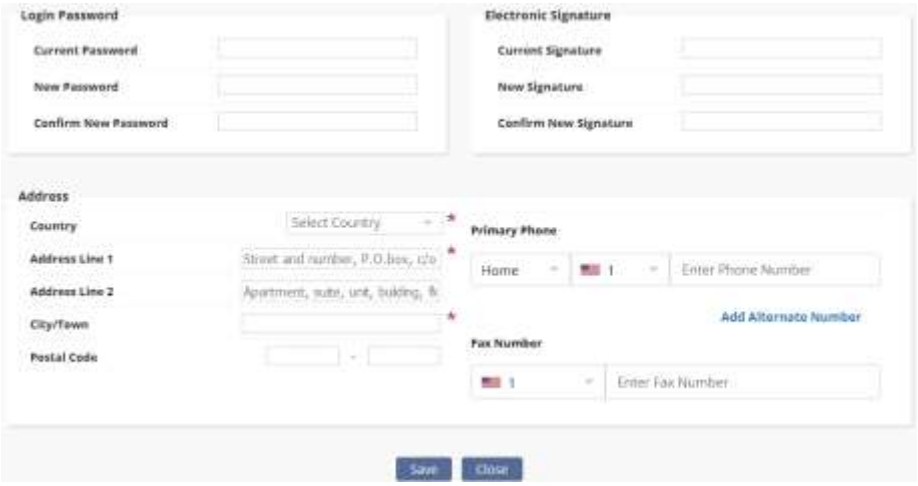
Missed Visit Form - Select the Missed Visit Form icon, and a window will pop up, asking whether an Order [was] Generated, Physician Office Notified, Reason, Comments, and the user's Signature and Date. Then select the **Submit** button Once submitted, the visit will turn red.



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

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

Filter by:

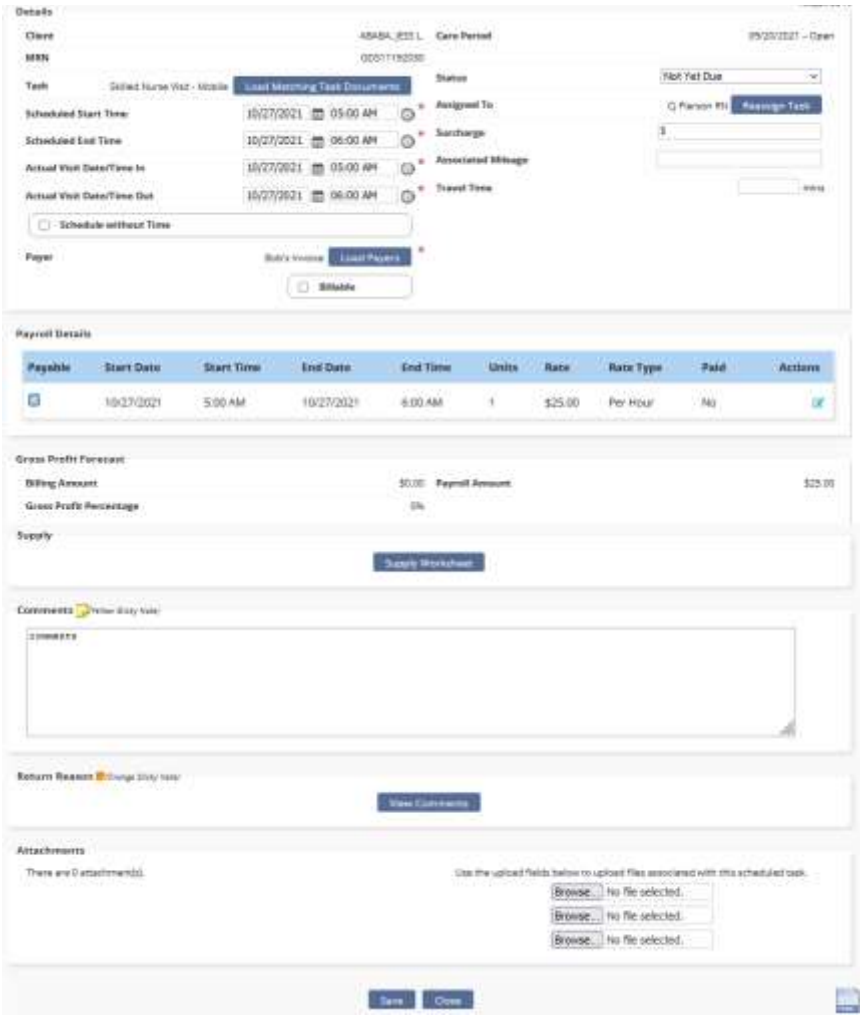
- Branch - Choose the branch (if more than one).
- Status - Status of the client (Active, Discharged, Pending, Non-Admit, Hospitalized).
- Type - Medical or Non-Medical.
- Payer - Payer Source.
- Tags - Free text to type in search term.
- Find - Free text to type part of a client's name.

Client'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.

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.

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):

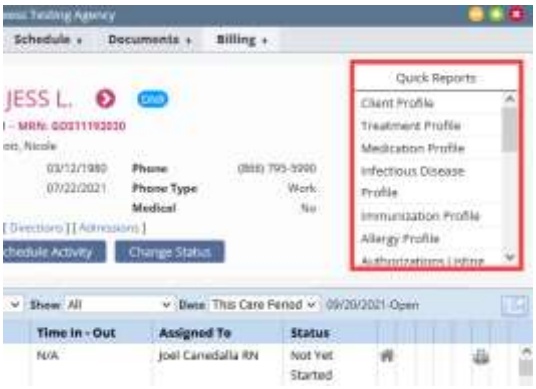
TASK DETAILS



- 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 Payors** 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

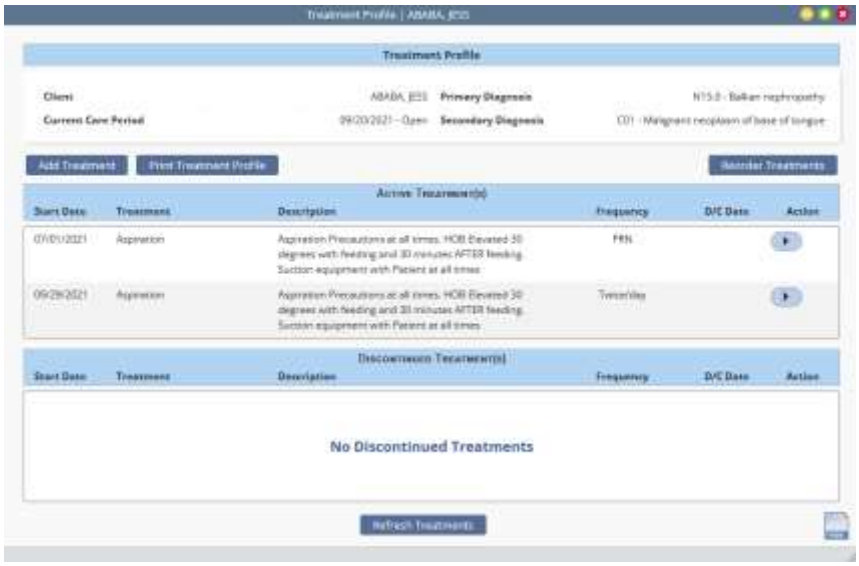


NOTE: The following Quick Reports are permissions based.

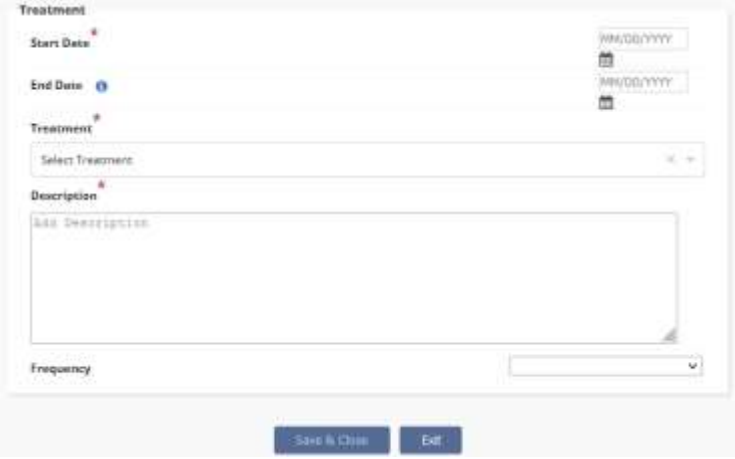
Client Profile

PDF print out of the client information taken at admission.

Treatment Profile



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.



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.

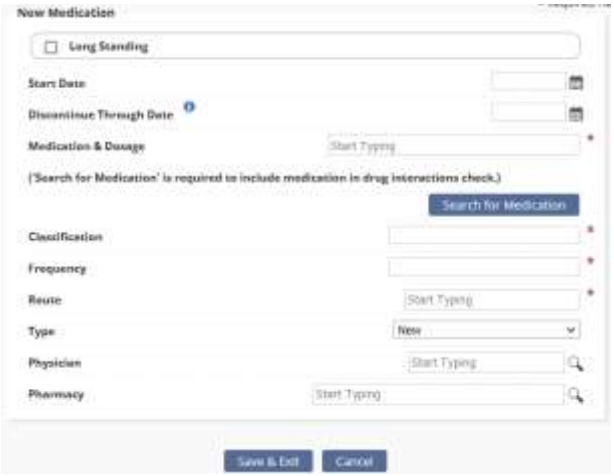
Select the **Print Treatment Profile** button to see a printable view of the treatment profile. Select the **Refresh Treatments** button to make the profile list

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

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

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.

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.

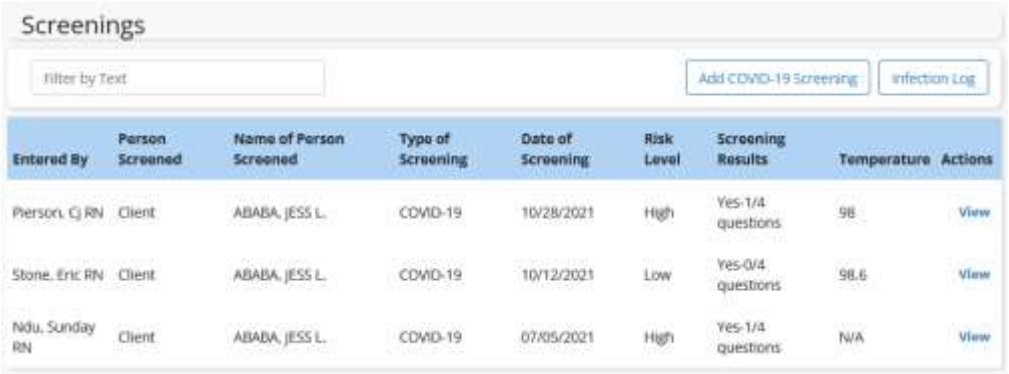
To view any prior signed Medication Profiles, select **Signed Medication Profiles** and a window will pop up with a list of previously signed profiles. Select the printer icon to view and/or print the signed Medication Profile or select the **Edit** or **Delete** hyperlinks to make updates.

Infectious Disease Profile

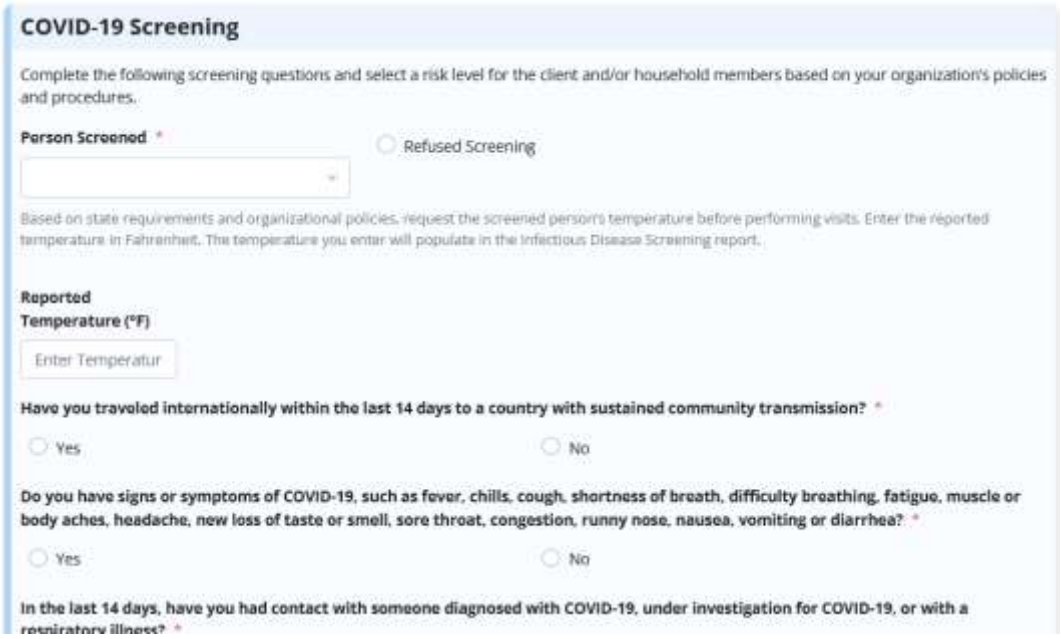
The Infectious Disease Profile is designed to help organizations easily track infectious diseases and screening tools used to detect them. Infectious disease screenings that have been completed are listed in the Infectious Disease Profile with the following details:

- 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.



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.



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**.

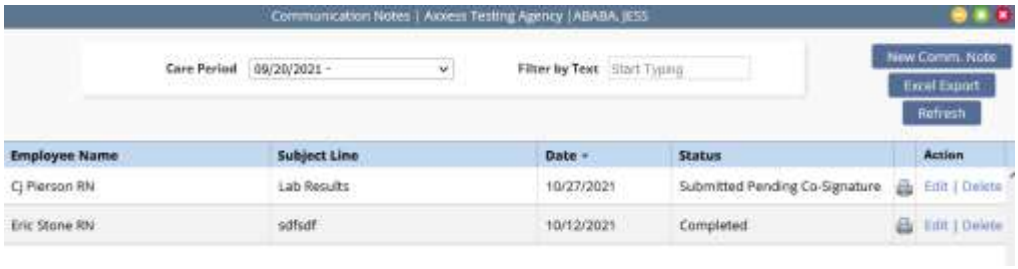
Type in the name of the allergy and the Type of allergy. Select **Save & Exit,** and the allergy will be added to the report. If there are additional allergies, select the **Save & Add Another** button.

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.

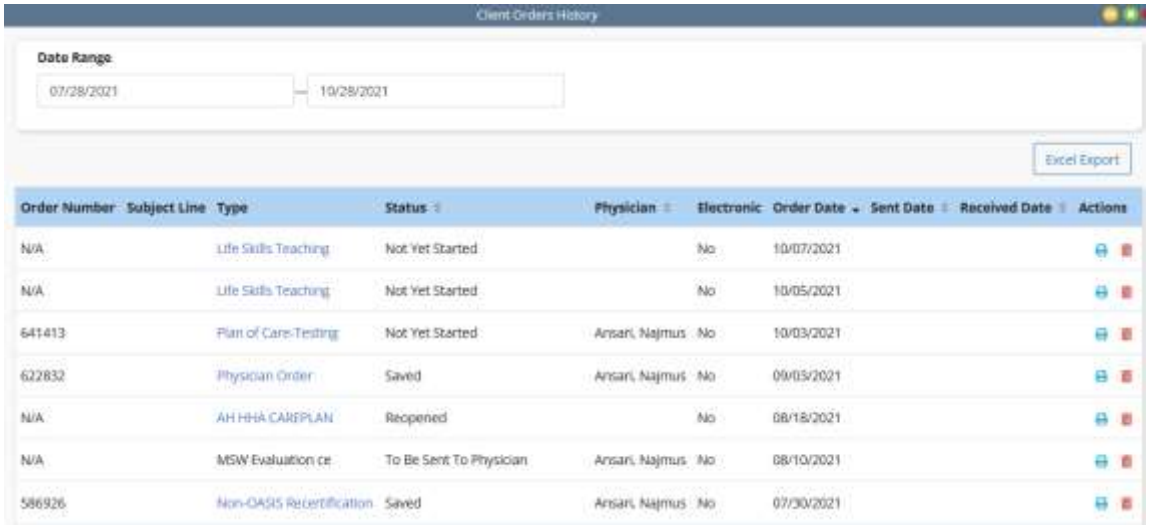


Select the printer icon and a PDF document will generate with the ability to **Print** and/or **Download**:

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

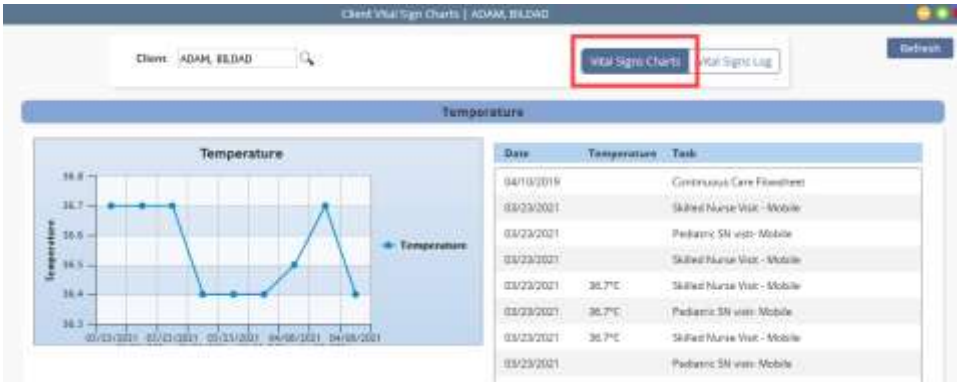
provides the basic details of the orders with the ability to view, print and/or export the document:

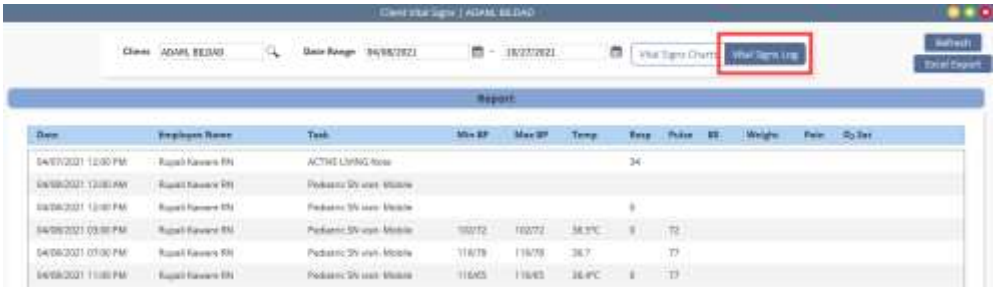


Verify that this is the correct date range. Select the printer icon and a PDF document will appear with the ability to **Print** and/or **Download**:

Vital Sign Charts

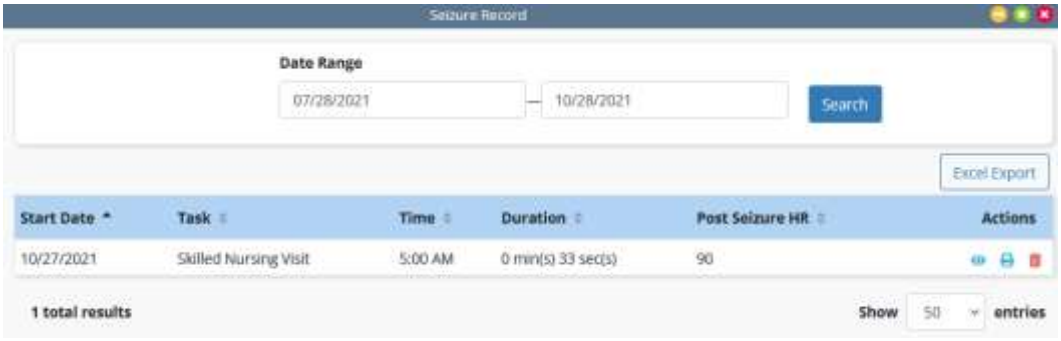
This report pulls a chart of all the prior vital signs documented on visits and a graphic view of their trends. There is also a Vital Signs Log that shows a summary list of all the three taken:





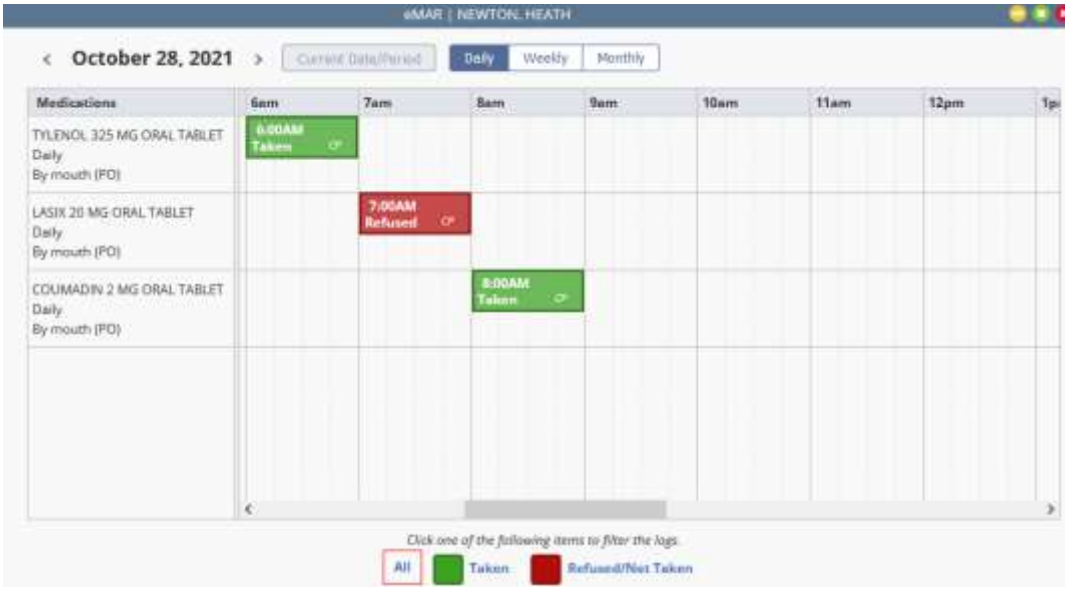
Seizure Records

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.

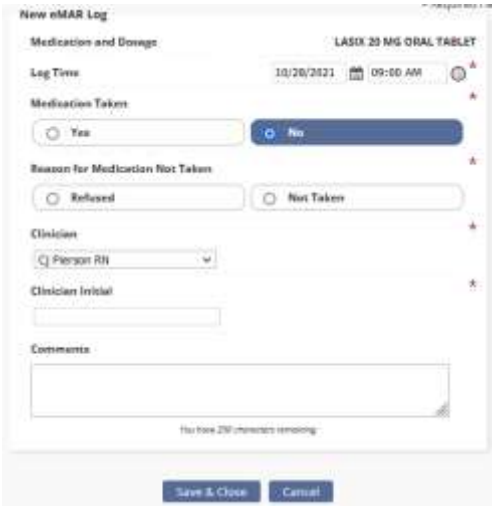


eMAR Chart

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.



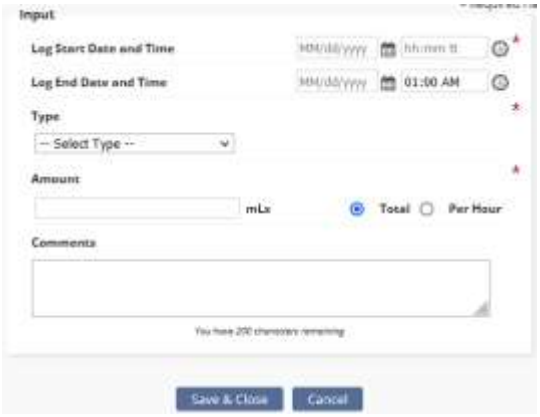
Vent Flow Sheet

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

I&O Logs

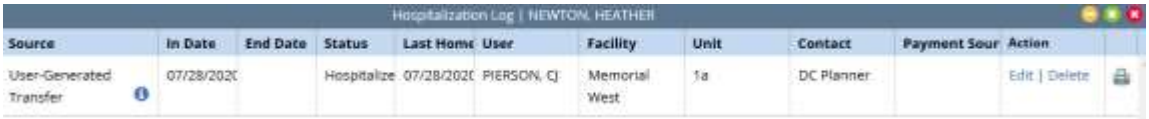
This report documents the input and output for clients. The report can be viewed by the summary or detailed view. Select **Refresh** to make the list up to date or select **Excel Export** to get an excel copy of the report.

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.



Hospitalization Log

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



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.

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.

Client Service Goals

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.

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.

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.

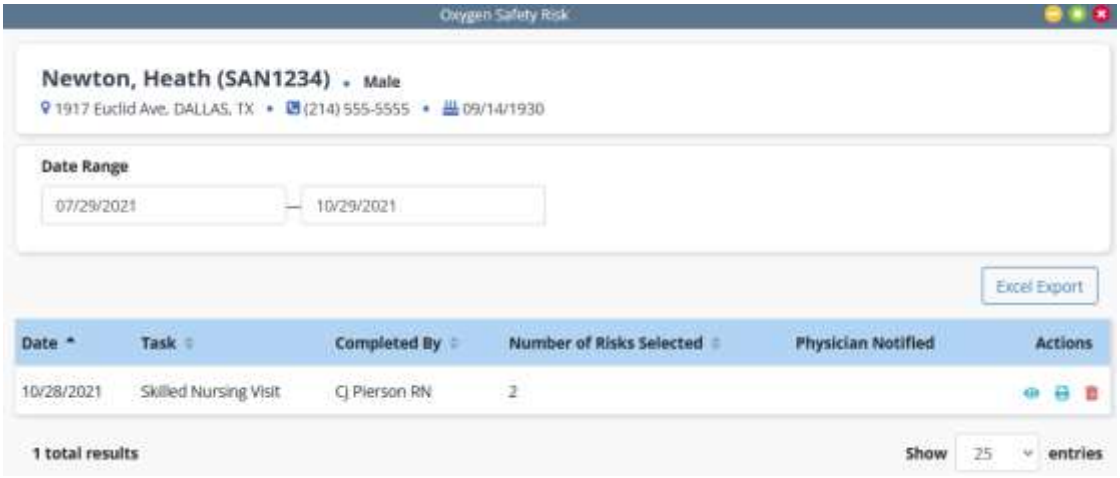
Suction Log

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.

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.

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.

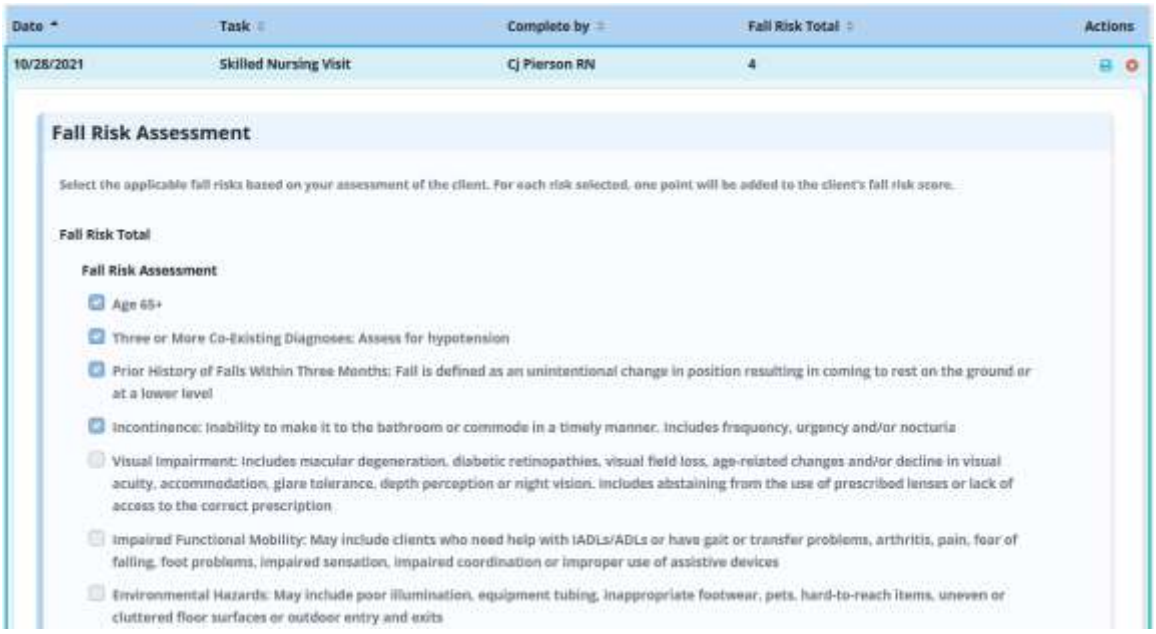


At the top of the report screen, enter a date range to display oxygen risk addenda completed within a specific time frame. The date range is limited to three months. Below the date range filter, users can view all oxygen risk addenda completed in the selected time frame. Depending on permissions, users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

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.

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



Deleted Tasks/Documents

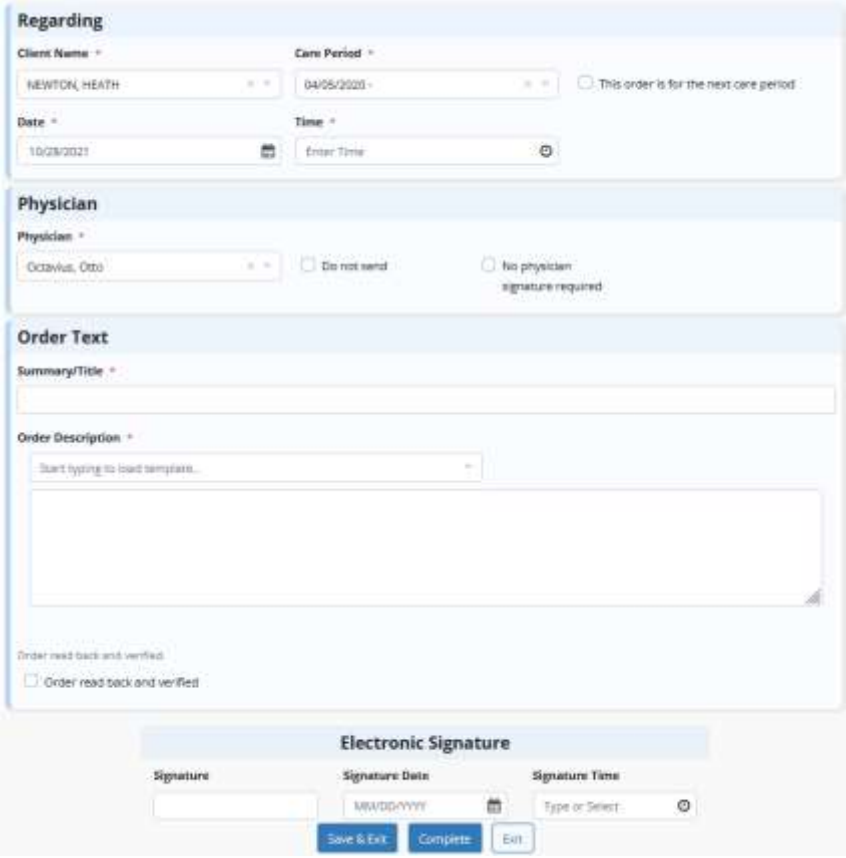
See Deleting a Task below

CLIENT CHART TABS

CREATE

Order

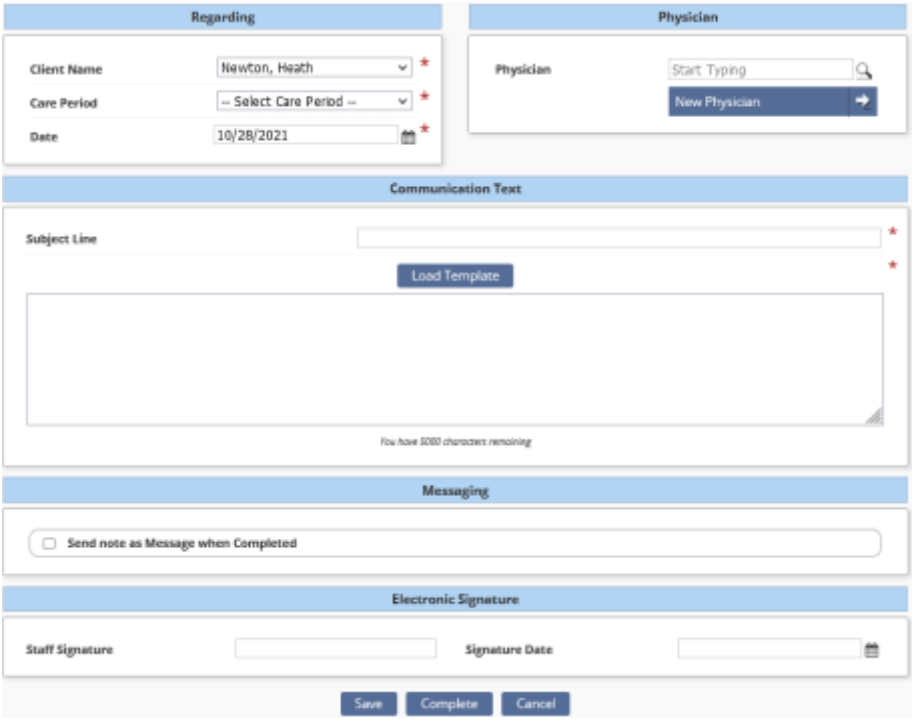
Client Center/Create/Order



- 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

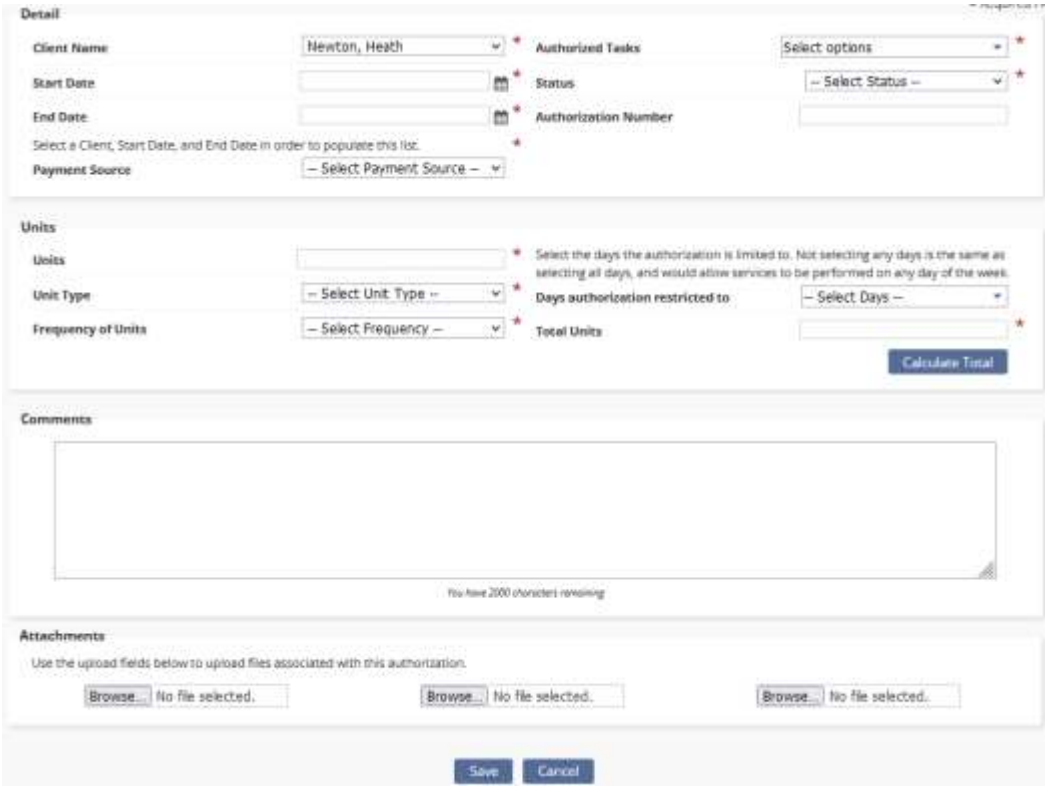
Client Center/Create/Communication Note



- 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



- 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**.

View Documents

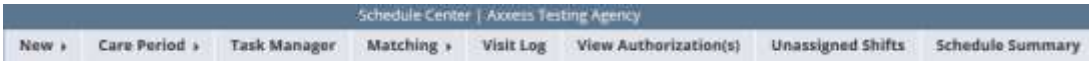
Client Center/Documents/View Documents

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.

SCHEDULE CENTER

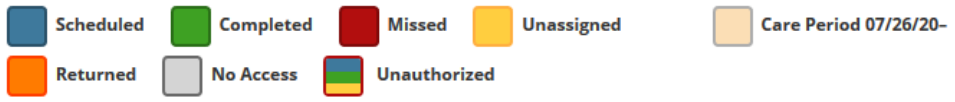
Client Center/Schedule Activity or *Schedule/Schedule Center*

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.



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.

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



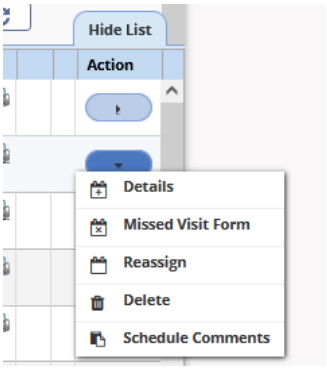
SCHEDULING A TASK (PERMISSIONS BASED)

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

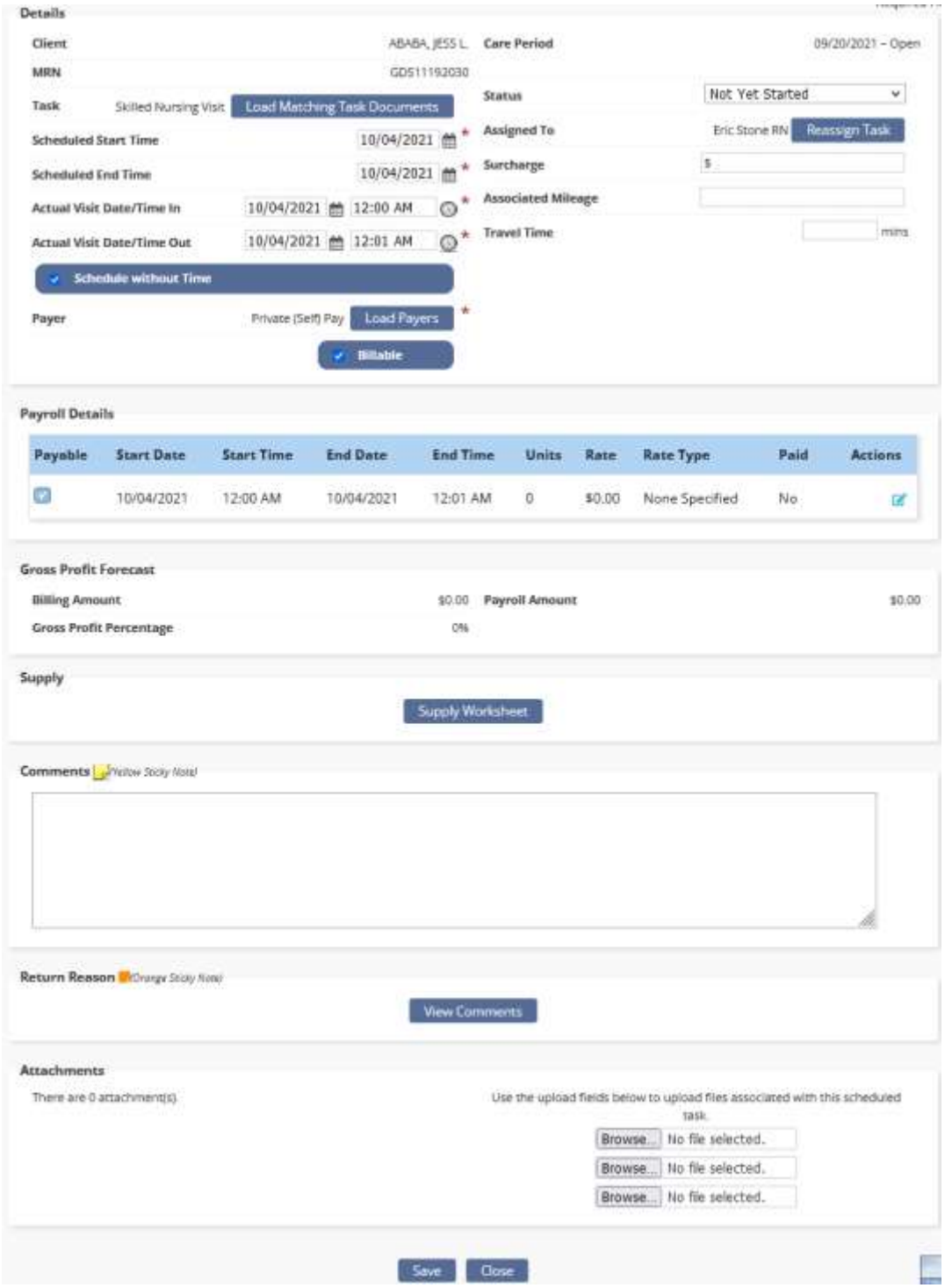
Choose a Shift Length and whether to Override Shift Length or Schedule without Time by selecting the checkboxes. Enter the From and to date and time. Choose the Payment Source, Task, Recurrence and the Caregiver/Employee completing the task. There is an optional Comments box with a 1,000-character limit.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

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).



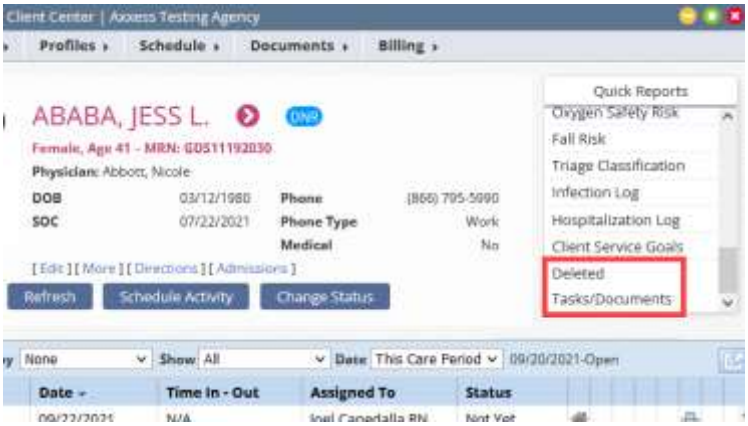
The window will open, displaying the details of the task. Make edits to the task, add comments, add attachments, add supplies or view the Activity Log. Select **Save** to keep any updates.



DELETING A TASK (PERMISSIONS BASED)

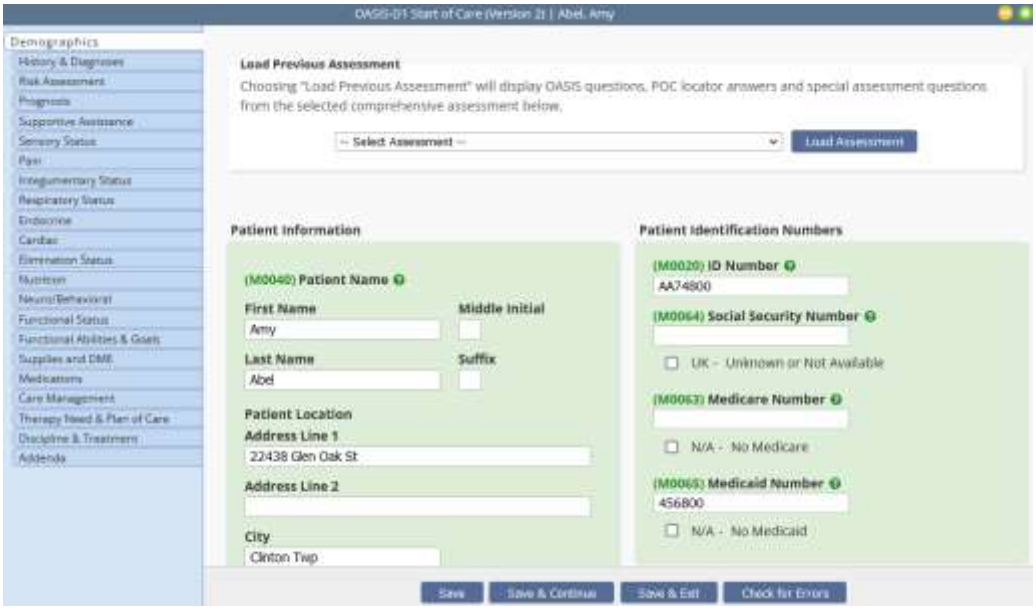
Hover over a task and select the trash icon or (from the Task List view) go to the Menu drop-down and select **Delete** to remove a task. The confirmation below will appear:

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.



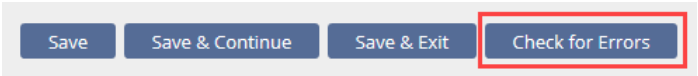
OASIS-D1 START OF CARE

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.



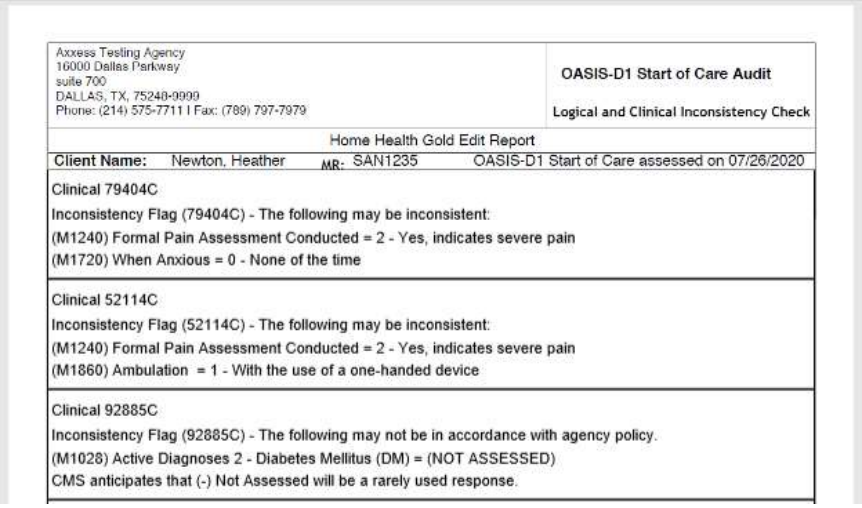
- **Green Boxes** - Information in the Green boxes are the M questions that will be exported to CMS. At the end of the OASIS, select **Check for Errors** and the system will make sure all OASIS questions are answered and not conflicting.
- **Grey Boxes** - These questions will pull to the Plan of Care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

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
16000 Dallas Parkway
suite 700
DALLAS, TX, 75248-9999
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

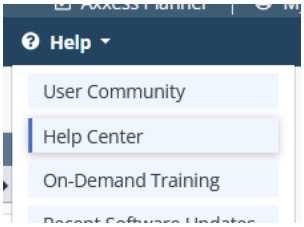
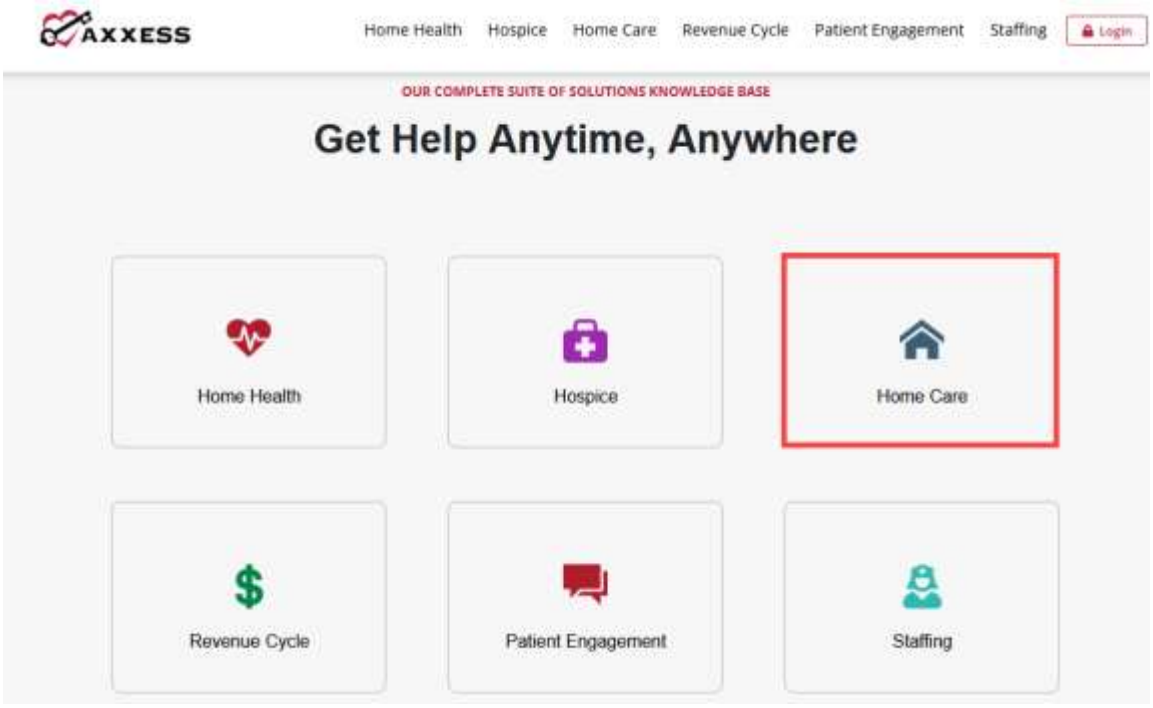
Clinical 92885C
Inconsistency Flag (92885C) - The following may not be in accordance with agency policy.
(M1028) Active Diagnoses 2 - Diabetes Mellitus (DM) = (NOT ASSESSED)
CMS anticipates that (-) Not Assessed will be a rarely used response.

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/