

HOME CARE MOBILE iOS MANUAL

November 2021

Table of Contents

DOWNLOADING APP3

MY SCHEDULE8

SCREENINGS 10

EVV..... 12

 Unable To Sign 14

 Client Signature 15

 Patient Voice Recording 18

MOBILE DOCUMENTATION..... 19

 Consecutive Visits25

 Addendums27

MENU28

DOWNLOADED VISITS29

 Offline Documentation31

MY MESSAGES32

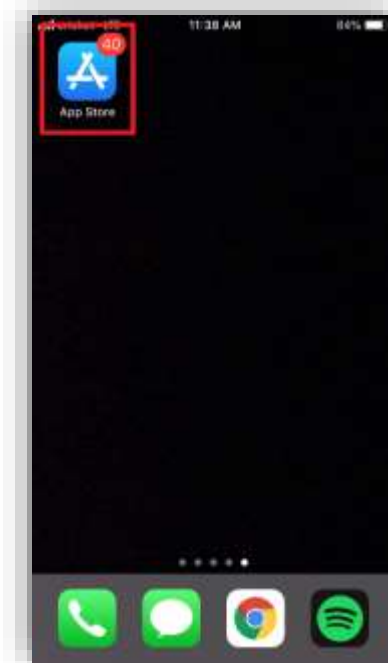
MY CLIENTS35

SETTINGS.....40

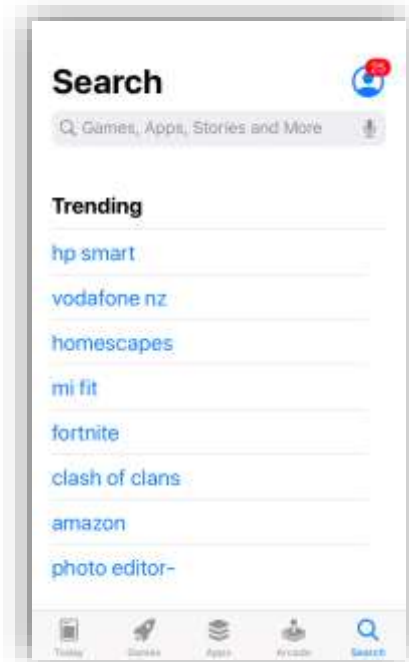
HELP41

DOWNLOADING APP

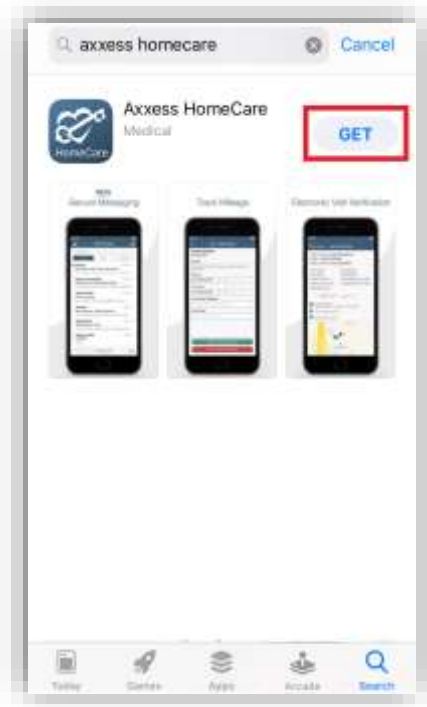
Go to the Apple App Store.




Tap on the search feature at the bottom right of the page.

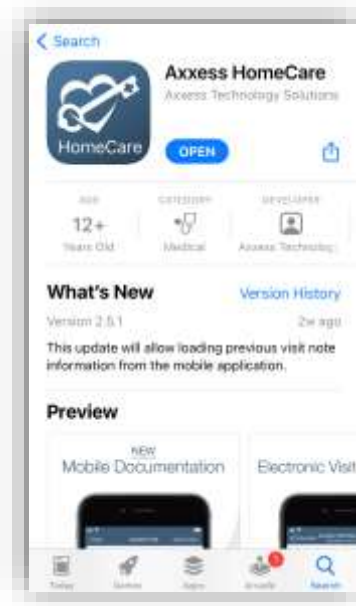


Search for “Axxess HomeCare.” The app is blue and says HomeCare at the bottom of the Axxess logo (heart & key). Tap the **GET** button. Then there will be a pop up from the bottom of the screen (if logged into an Apple account) with an **Install** button. Then the download process will begin.



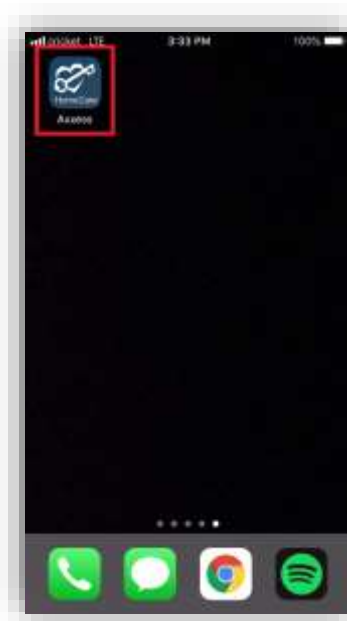
NOTE: If the app is accidentally removed, go back to the App Store, search for HomeCare and tap on the Axxess HomeCare app. To re-download the app, tap the cloud  icon.

Once downloaded, tap the **OPEN** button.



The app will now be located with the rest of the user's apps.

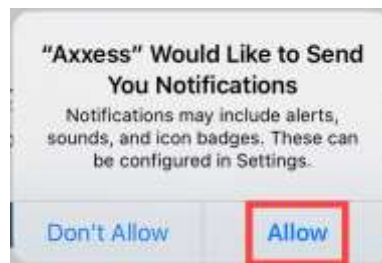
NOTE: Always make sure to update the app for the latest version in the App Store for free.



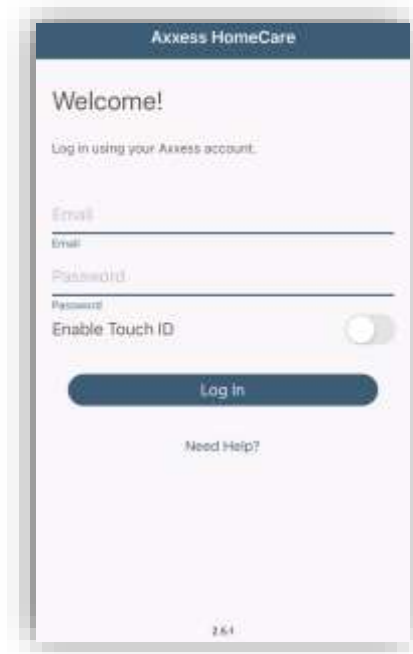
Tap on the Home Care app to open. Tap **Allow While Using App** so that Axxess can access the location while using the app. Allowing this feature is **critical** for the app to pinpoint the location accurately for Electronic Visit Verification (EVV), which will be covered later.



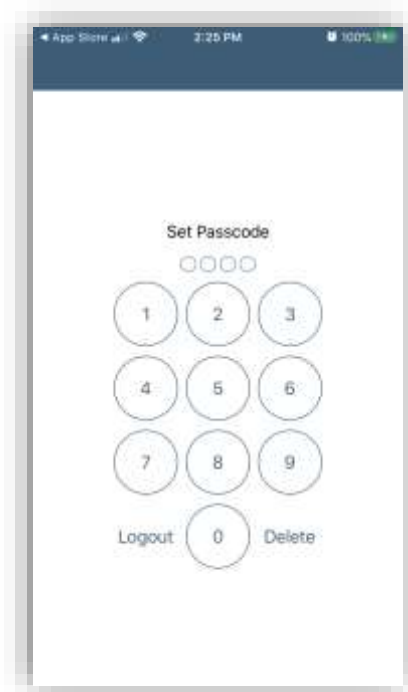
Tap **Allow** so that Axxess can send notifications to the user.



The following is the login screen. Enter the email provided to the organization and the password that was established while logging into the web version of Axxess Home Care. If the password was forgotten, then tap the **Need Help?** hyperlink. Enter the email address associated with the account and then tap the **Reset Password** button to send the password reset instructions to the email. The version number of the app will be listed at the bottom. Enter the Email Address and Password, then tap **Log In**.

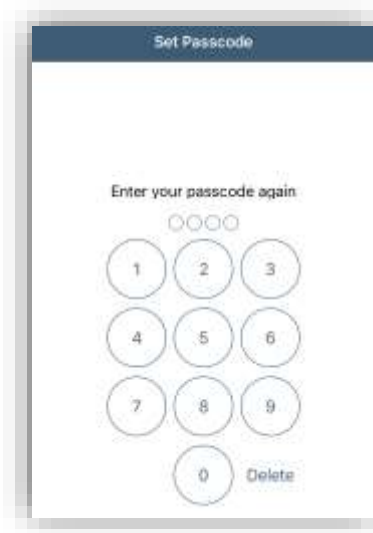


The user will then be required to create a 4-digit passcode.



Once a 4-digit passcode has been entered, confirm the passcode by entering it one more time. ***Any time the user leaves the app or the app times out due to inactivity, the passcode must be reentered.***

NOTE: After five incorrect attempts, the user will be prompted to log back into the app and create the passcode.



MY SCHEDULE

The following is the **Schedule**. The Schedule is split up between three tabs at the top of the page: **Past Due**, **Upcoming** and **Completed**. The number in parentheses next to the tab title is how many tasks/visits are in each.



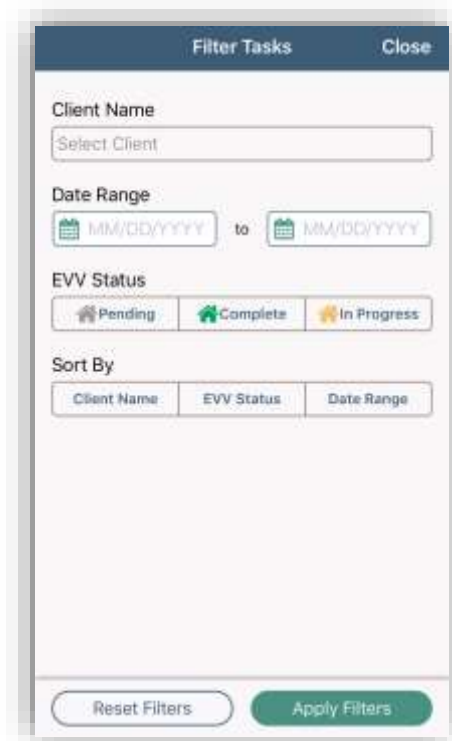
Visits will be listed one by one. It will show the visit date and the planned visit time to the right. Below is the client's name in **bold**. Below is the type of visit and to the left is the EVV status. These are the three different EVV statuses:



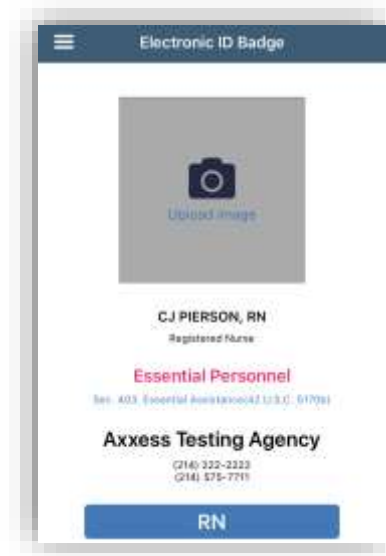
To narrow down the list of items, use the Search bar below the schedule tabs. Tap inside the search and start typing the name of the client.



Another way to narrow down the list of clients is with the **Filter** button at the bottom of the page. Search by Client Name, Date Range, EVV Status or Sort the schedule by Client Name, EVV Status or Date Range. Once a filter has been chosen, tap the **Apply Filters** button on the bottom right. For filters to go back to their original defaults, tap the **Reset Filters** button in the bottom left.

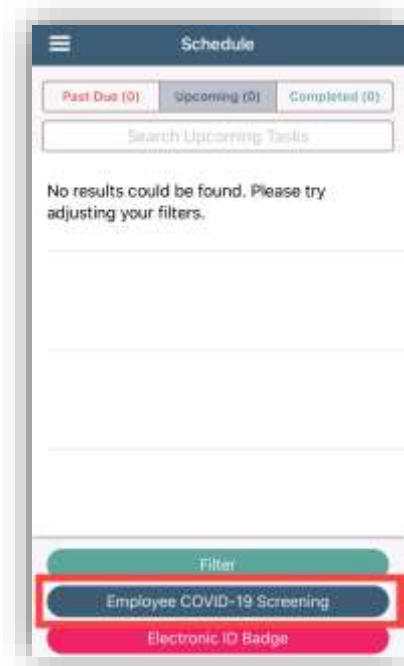


Tap the **Electronic ID Badge** button for a quick view that users can show when seeing clients. Tap **Upload Image** to take a photo or choose from the photo library for a picture of the user.

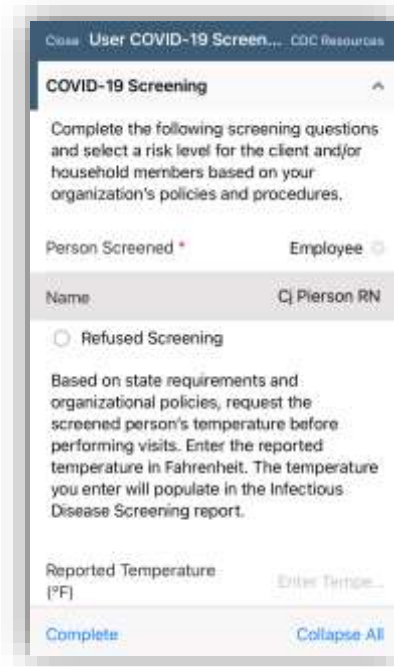


SCREENINGS

All mobile app users can complete a COVID-19 screening from a mobile device. From the Schedule screen, select the **Employee COVID-19 Screening** button or select the menu button in the top left and select Employee COVID-19 Screening.

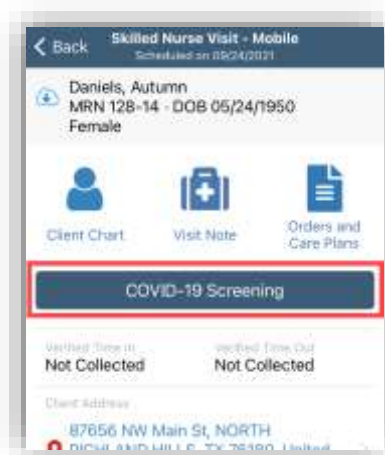


Enter a Temperature. Answer the screening questions and assign a risk level based on the organization's policy. There is a space for Templates or free text. Select the Screening Acknowledgement and enter the Date and Time. Tap **Complete** to save the screening. Once completed, the screening information flows to the employee's Infectious Disease Profile.



The screenshot shows a mobile application interface for a COVID-19 screening form. At the top, it says "User COVID-19 Screen..." and "CDC Resources". The main heading is "COVID-19 Screening". Below this, there is a paragraph of instructions: "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." There are two radio buttons for "Person Screened": "Employee" (selected) and "Client". The "Name" field is populated with "CJ Pierson RN". Below this, there is a section for "Refused Screening" with a radio button and a paragraph of text: "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." There is a "Reported Temperature (°F)" field with a placeholder "Enter Temper...". At the bottom, there are two buttons: "Complete" and "Collapse All".

Select a client visit and tap the **COVID-19 Screening** button at the bottom of the screen to complete a client COVID-19 screening for a client.



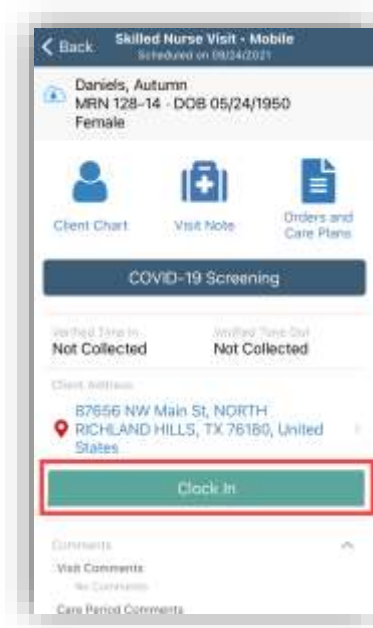
The screenshot shows a mobile application interface for a client visit. At the top, it says "Skilled Nurse Visit - Mobile" and "Scheduled on 02/24/2021". Below this, there is a client profile card for "Daniels, Autumn" with "MRN 128-14 - DOB 05/24/1950" and "Female". There are three icons: "Client Chart", "Visit Note", and "Orders and Care Plans". Below these icons, there is a red-bordered button labeled "COVID-19 Screening". At the bottom, there are two fields for "Visited Time In" and "Visited Time Out", both labeled "Not Collected". There is also a "Client Address" field with the address "87656 NW Main St, NORTH DALLAS, TX 75190, United States".

Choose the Person Screened including their Name and Relationship. Enter a Temperature. Answer the screening questions and assign a risk level based on the organization's policy. There is a space for Templates or free text. Select the Screening Acknowledgement and enter the Date and Time. Tap **Complete** to

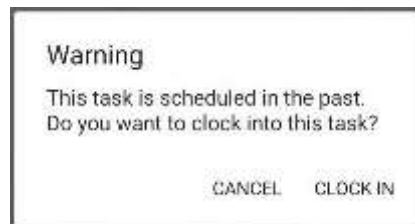
save the screening. Once completed, the screening information flows to the client's Infectious Disease Profile.

EVV

To start the Task Verification process, tap on the visit from the Schedule. It will show the Client Name, MRN, DOB, Task Type and Date. There are links to the **Client Chart**, **Visit Note** and **Orders and Care Plans**. Patient or caregiver COVID screenings can be conducted by selecting the **COVID-19 Screening** button. The Client Address to the right of red push pin icon is a hyperlink. Tapping on the address will prompt the device to open the map app of the user's choice. Tap **Clock In**.



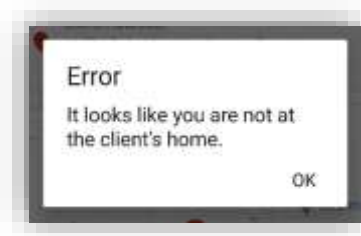
When a user attempts to clock into a visit that is scheduled **at least one day but fewer than six days in the past**, the app will provide a warning message informing the user that the visit is scheduled in the past.



When a user attempts to clock into a scheduled visit **over five days in the past**, the app will provide an error message informing the user that the visit is over five days old. Users can select **OK** to exit the warning message without clocking into

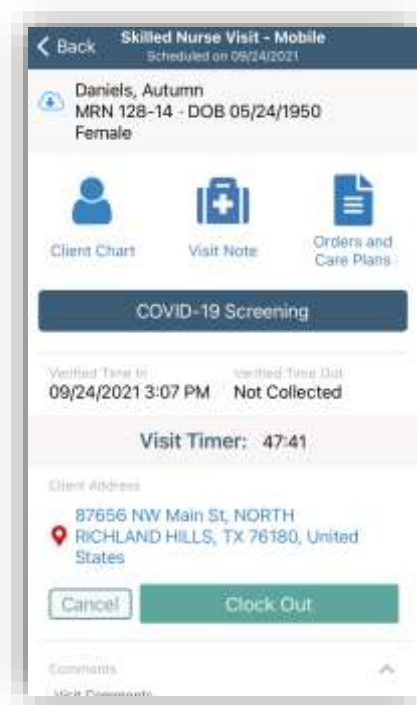
the visit. Users cannot clock in to visits that are older than five days. If a user needs to complete a task that is older than five days, the task must be rescheduled.

If the user is not located within a reasonable distance to the client's home, the following error will display:



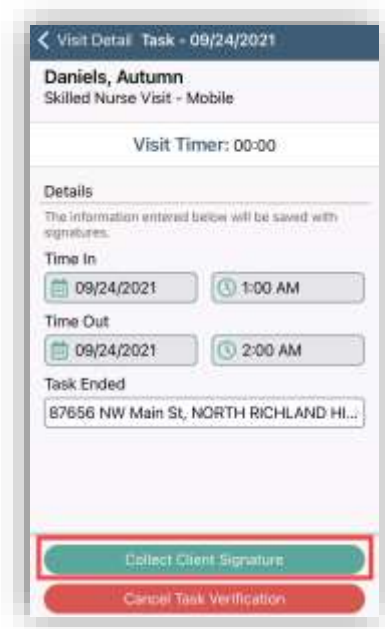
If the user is in range of the client's home, the app will begin retrieving the location. Once retrieved, the client's name is listed at the top of the page followed by the type of visit. Tap on the Time In & Out calendars and clocks to update. Enter any optional Associated Mileage or Surcharge.

Once the caregiver clocks in, the visit timer becomes visible from the **Task Details** screen and **Visit Note** screen if applicable. Visit Comments and Care Period Comments are also visible along with direct links to the **Client Chart**, **Visit Note** and **Orders and Care Plans**.



When the visit is finished, select the **Clock Out** button. Then tap **Collect Client Signature**.

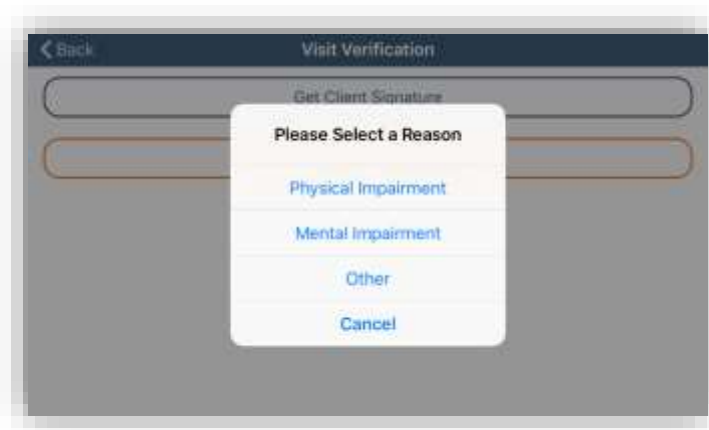
NOTE: This setting is chosen in **Manage Company Information**. Users may or may not have access to change the time in/out depending on setting choice.



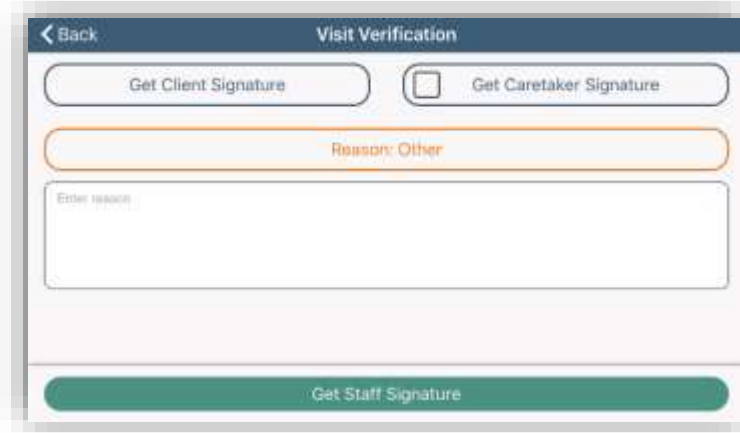
Unable To Sign

If the client is not able to sign the verification, tap **Select Unable To Sign Reason**. Choose from the following options:

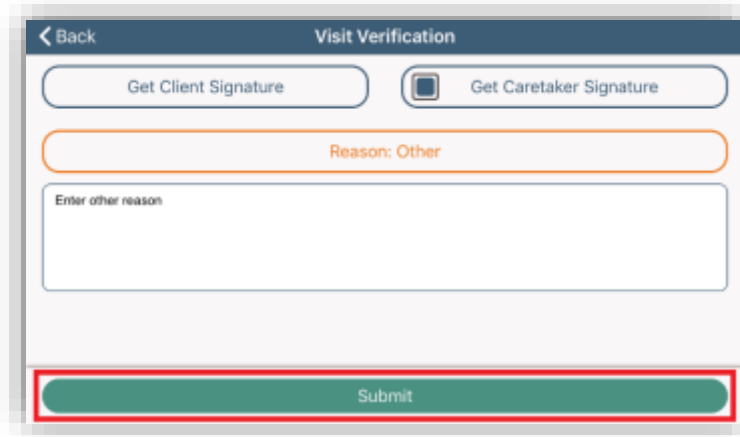
- Physical Impairment
- Mental Impairment
- Other



If Other is selected, the following page will display. Enter the Reason in the free text space. If the Caretaker will be the one signing on behalf of the client, tap **Get Caretaker Signature**. If the Staff will be the one signing on behalf of the client, tap **Get Staff Signature**. Then Sign and tap **Done** in the top right.

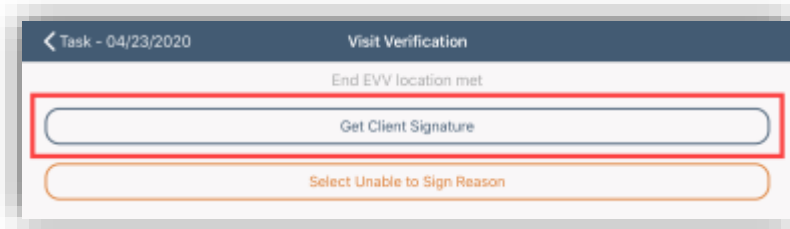


After the Other reason has been entered and the Caretaker has signed, tap on **Submit**.



Client Signature

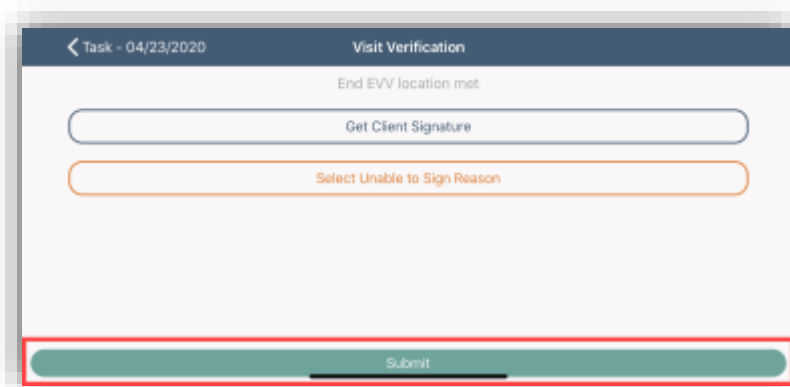
Tap on **Get Client Signature**.



Use a finger or stylus to enter the Client Signature and tap **Done** in the top right.





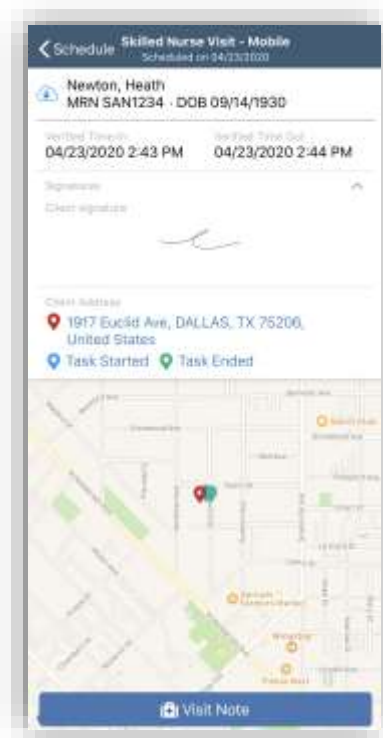
The following screen will display. Tap **Redo Client Signature** to try again, or tap **Submit** to continue.



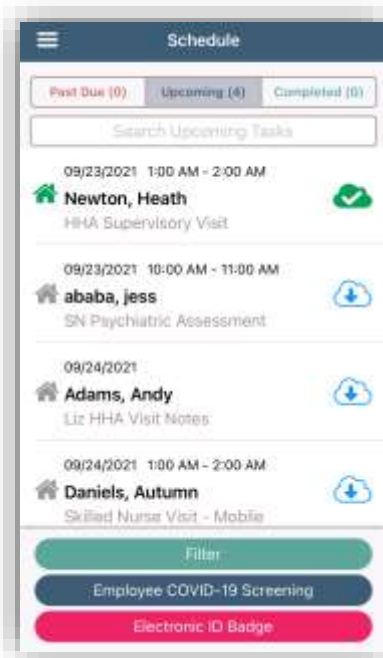
A confirmation will display that the EVV process is complete. Tap **OK** to continue.



The Task Verification page will now display the Verified Time In & Out, the Signature, the Task Started Location  icon and the Task Ended Location  icon. Tap on **Schedule** in the top left to get back to the schedule.



The EVV Status icon next to the client name will be updated to green.



Patient Voice Recording

Users can collect a patient voice recording after selecting **Patient Unable to Sign**. When a patient is unable to provide a signature to verify services, tap **Patient Unable to Sign** and select the reason that a patient's signature cannot be obtained. After specifying a reason, select **Collect Patient Voice Recording** to capture the patient's audio voice recording.



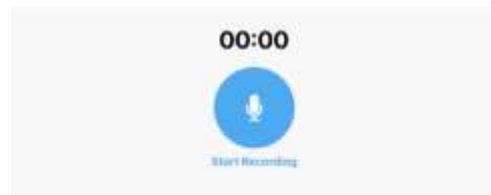
Patient Unable to Sign Reason: Physical Impairment

Collect Patient Voice Recording

Collect Caretaker Signature

Select **Start Recording** and instruct the patient to state their name and the date of service.

When recording begins, state your name and date of service.



Select **Stop Recording** to end the recording once the patient has stated their name and the date of service. The recording will stop automatically if not ended before 30 seconds.



When recording begins, state your name and date of service.



Tap **Play** to play the recording. Select **Replace** to re-record or **Submit** to submit the recording. Once submitted, the **Patient Voice Recording** button updates to

green to indicate that the recording was saved, and the user can continue completing the visit.



The Patient Voice Recording label will appear on the visit, instead of the patient signature, to indicate that a voice recording was collected to verify the visit.




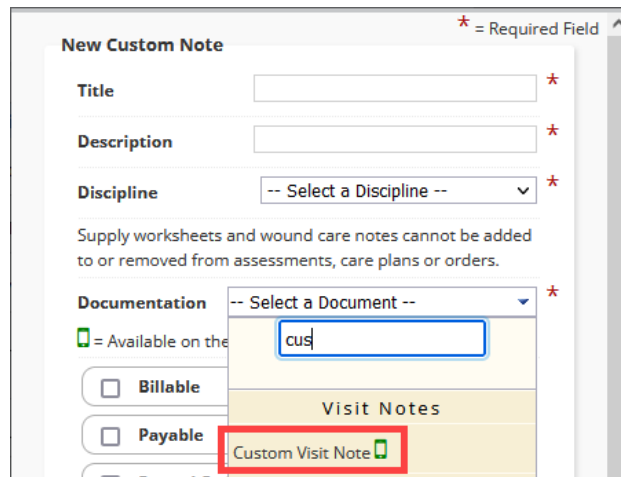
Once the visit is complete, the patient voice recording is saved and stored on the Electronic Visit Verification (EVV) Log screen. Users can play and download patient recordings from this screen for auditing purposes. To access the Electronic Visit Verification (EVV) Log screen, navigate to the Schedule Center or Patient Charts and select on the green house associated with the visit.



MOBILE DOCUMENTATION

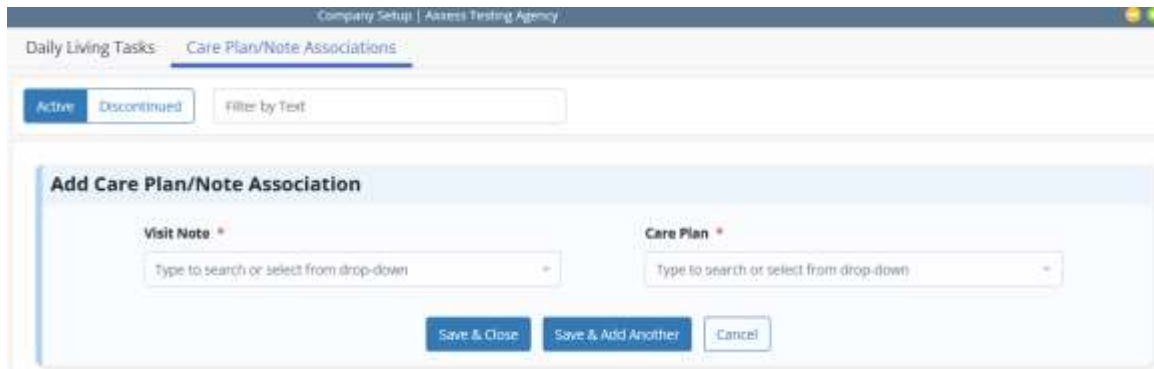
Mobile custom visit notes are available on iOS devices so caregivers can document visit information at the point of care. These must be set up in the Home Care web application by going to *Admin/Company Setup/Document Management* and selecting the **New** button, then completing the New Custom Note box (permissions required).

In the Documentation field, select **Custom Visit Note** from the drop-down menu. The  icon appears next to documents that are available in the Home Care mobile app. Select **Save** to create the note.



NOTE: Other Mobile notes can be added from here including Skilled Visit Notes.

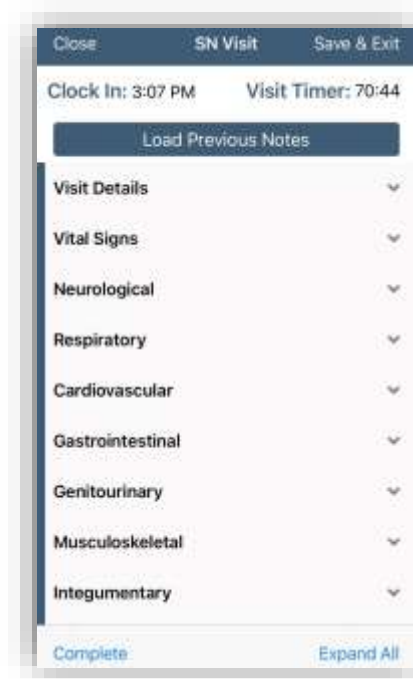
Navigate to the *Admin/Company Setup/Custom Care Documentation/Care Plan _Note Associations* tab at the top to link your new note to a care plan. Select **Add New** in the top right corner. Select the note from the Visit Note drop-down menu and link it to a care plan using the Care Plan drop-down menu. Select **Save & Close**. Once set up, schedule the custom visit note for any future visits.



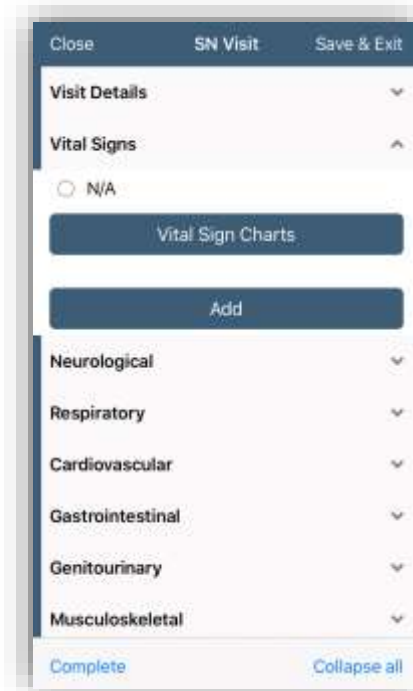
Tap the **Visit Note** button to start mobile documentation inside the mobile app.



Below is Skilled Nurse Visit. The visit is split up into categories.



Tap the category to expand the section or tap the **Expand all** in the bottom right to open every category at once. Tap Collapse all to minimize all categories at once.



Below shows how users enter vital signs.



Close Save & Exit

Details

Date * Enter Date

Time * Enter Time

Vital Signs

Respirations (/min) /min

Weight lbs/kg

Scale lbs/kg

Temperature: *F/*C

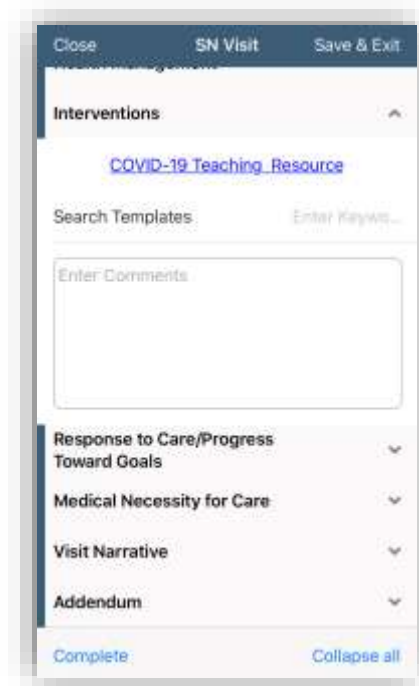
Scale *F/*C

Route Select Route

Pulse Rate (/min) /min

Expand all

Some sections allow for entering comments, and other categories like Interventions can enter templates inside the comments section.



Close SN Visit Save & Exit

Interventions

[COVID-19 Teaching Resource](#)

Search Templates Enter Keywo...

Enter Comments

Response to Care/Progress Toward Goals ▾

Medical Necessity for Care ▾

Visit Narrative ▾

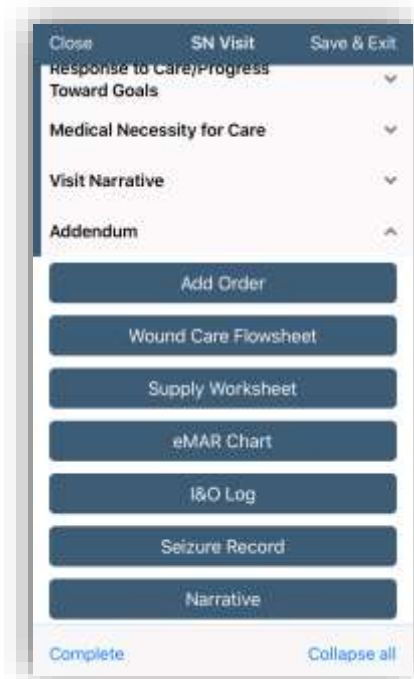
Addendum ▾

Complete Collapse all

Enter a keyword inside the Search Templates section, and then Tap the applicable template.



Some sections have buttons that must be completed in the web application and not the mobile documentation.

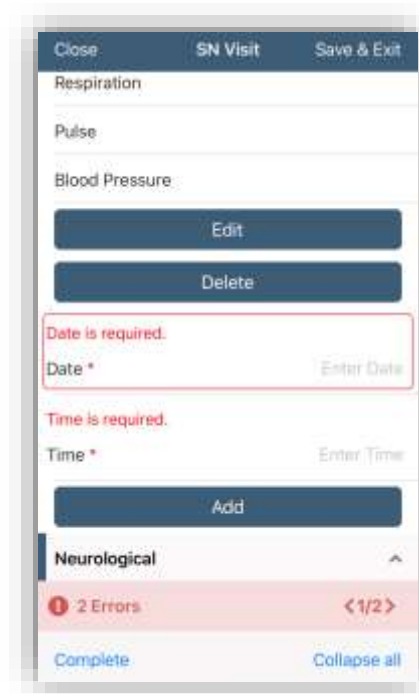


Users will see the following notification.

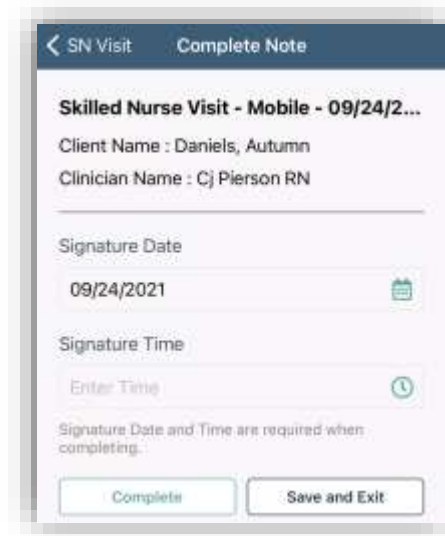


When documenting care in the Home Care mobile app, users can see the total number of errors in their documentation and follow step-by-step guidance on how to correct each error. Once a user finish documenting and taps **Complete**, guided validations appear.

Errors are highlighted in red with messages identifying how to correct each error. The total number of errors is provided in the red ribbon banner at the bottom of the note, and arrows in the bottom right corner enable users to navigate through each of the validation errors.



Tap **Complete** in the bottom left when finished. Confirm the Signature Date and enter the Signature Time, then tap the **Complete** button.



Enter Signature, then tap **Done** in the top right. A confirmation will appear that says, “Success Note completed.” Tap **OK**.

Consecutive Visits

To clock in and out for multiple consecutive visits at once, the caregiver must have two or more visits scheduled back-to-back for the same client. To clock in, select the earliest of the consecutive visits. On the selected visit screen, confirm that all information is accurate and tap **Clock In**. If consecutive visits are scheduled, the **Consecutive Visit Alert** appears. Check the boxes next to the desired visits and tap **Clock In**.



Users can cancel EVV clocking by tapping **Cancel** on the visit screen next to **Clock Out**. To cancel EVV clocking for multiple consecutive visits, caregivers must cancel each consecutive visit individually. Once the visits have been completed, tap **Clock Out**. Selecting **Clock Out** triggers the **Time Review** screen where caregivers can review **Verified Time In** and **Verified Time Out** for the completed visits.

The **Task Ended** field accommodates consecutive visits that start and end at different locations. To document visits that started and ended at different locations, click the arrow next to **Task Ended** and select the address where the last visit ended.

The following tasks are associated to this visit verification.

Verified Date In 01/13/2020	Verified Time In 09:15 AM
Verified Date Out 01/13/2020	Verified Time Out 01:12 PM
Task Ended 16000 Dallas Pkwy, Dallas, Tx 75248, United	
Associated Mileage Associated Mileage (Optional)	
Surcharge Surcharge (Optional)	

On the right side of the **Time Review** screen, enter the duration of each visit. The **Entered Time** will update in the bottom right corner as each visit duration is entered. In the bottom left, the **Total Time** reflects the time span from **Verified Time In** to **Verified Time Out**. To facilitate EVV compliance, the system prevents users from collecting the client signature until the **Entered Time** and **Total Time** match.

Surcharge
Surcharge (Optional)

01/13/2020 09:00 AM - 10:00 AM
Jones, Bill
Personal Care
Duration
1:00

01/13/2020 10:00 AM - 11:00 AM
Jones, Bill
Homemaking
Duration

Total Time: 3:57 Entered Time: 1:00

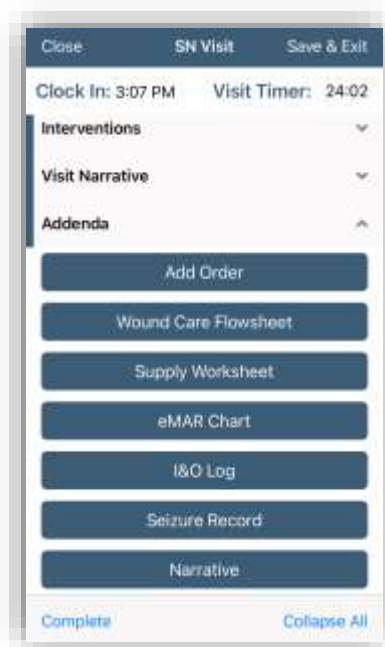
< > Done

1 Hour(s) 00 Minutes

Once the Entered and Total Times match, tap **Collect Client Signature** and sign & submit.

Addendums

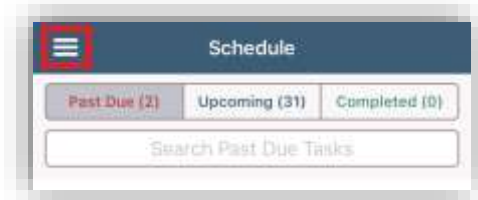
Axxess Home Care enables users to complete addenda through the mobile application. This functionality facilitates seamless documentation management and tracking to improve client outcomes and stay compliant. The following 10 items can be added or documented during a visit:



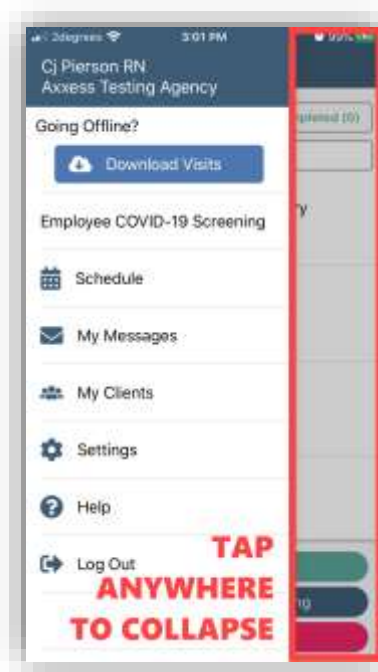
- Orders
- Wound Care Flowsheet
- Supply Worksheet
- eMAR Chart
- I&O Log
- Seizure Record
- Vent Flow Sheet
- Narrative
- Suction Log
- eTAR Chart

MENU

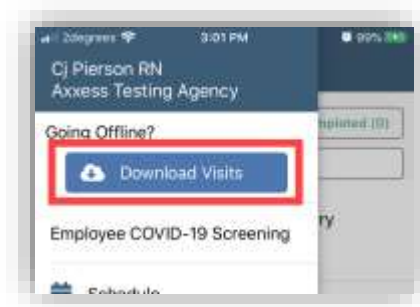
Tap the three-line Menu button in the top left.



There are six options: **Schedule**, **My Messages**, **My Clients**, **Settings**, **Help** and **Logout**. **Logout** will leave the app. A login will be required to get back in. Tapping outside of the side menu will collapse the menu.

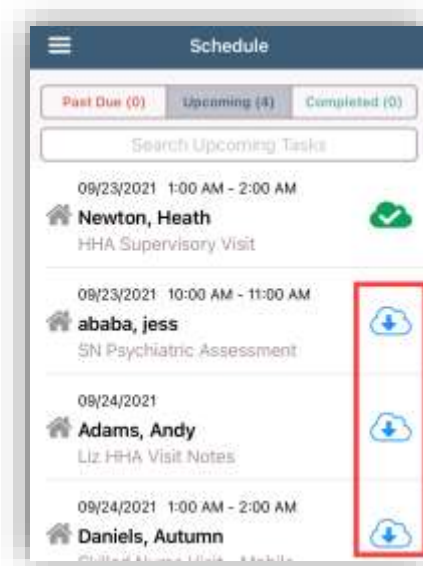



Tap the **Download Visits** button and all visits for the current day and subsequent two days will download automatically.



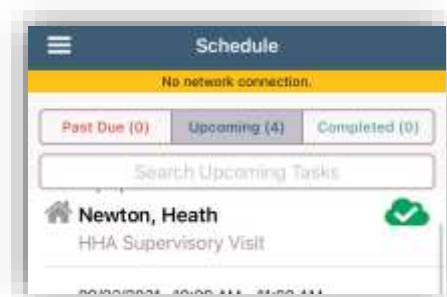
DOWNLOADED VISITS

To use offline functionality, caregivers must first download upcoming visits that will be performed in areas without internet connectivity. To download visits, open the Home Care mobile app while still connected to the internet. Visits listed in **Schedule** can be downloaded by tapping the blue cloud icon to the right of the visit

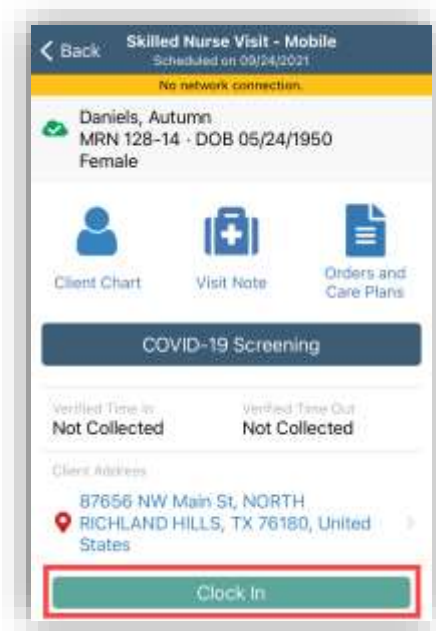


Once a visit has been downloaded, the blue cloud icon changes to an  icon to indicate a successful download. Before going offline, confirm that all the necessary visits have green cloud icons indicating that they have been downloaded. Once all necessary visits have been downloaded, the user can go offline but must stay logged in to the Home Care app on the mobile device.

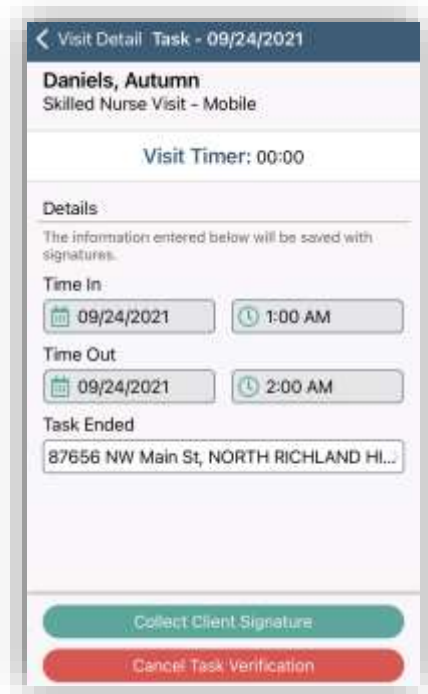
When the user has gone offline, a yellow banner will appear at the top of the screen to indicate that the user is offline, and the network connection has been lost. Visits that have not been downloaded appear with grey cloud icons indicating that they cannot be downloaded or performed offline.



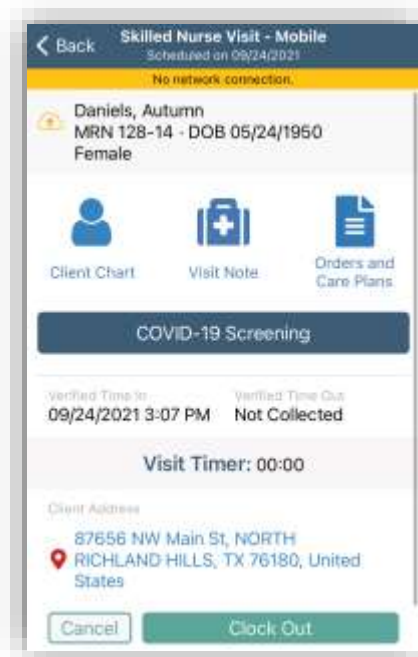
Tap a visit to start offline documentation and/or EVV. Only visits with green cloud icons can be performed offline. To use offline EVV only, Tap the visit from the upcoming visits list and tap **Clock In** on the start task screen.



Tap the back arrow in the top left corner of the screen.



The Verified Time In will populate and a yellow cloud icon will appear.



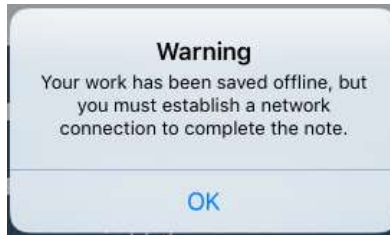
To end EVV for a visit, tap **Clock Out**. On the Visit Verification screen, the text box under **End Visit Location Does Not Match Client Address** enables users to document the reason that EVV location was not used.



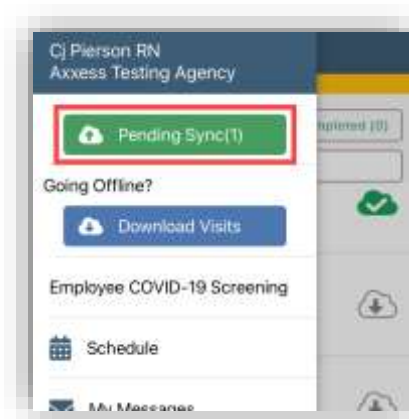
Offline Documentation

After opening a visit on the mobile app, tap **Visit Note** to start documenting offline. Document on your note as usual. When the visit is finished, tap **Save & Exit** or **Complete**. When either button is tapped, a message will confirm that

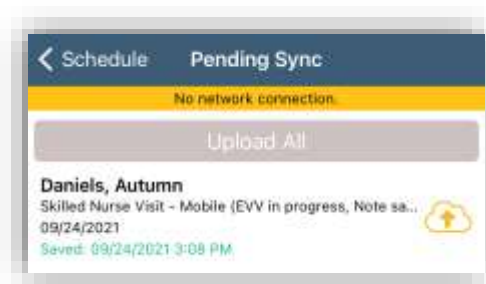
offline documentation has been saved, but the note cannot be completed until the user is back online.



Once the visit is saved, and connectivity is restored, the visit data must be synced. To sync the data, tap the three-line menu in the top left corner and tap **Pending Sync**.



Sync items individually by clicking the yellow cloud icon or sync all items at once by tapping **Upload All**. Once visit data is successfully synced, the visit will no longer appear in the **Pending Sync** window.




MY MESSAGES

Tap on **My Messages**. This is the HIPPA-Compliant, intra-organizational messaging feature. Messages are separated into three tabs: **Inbox**, **Sent** and **Deleted**. The bottom of the page will show the last time the messages were up to

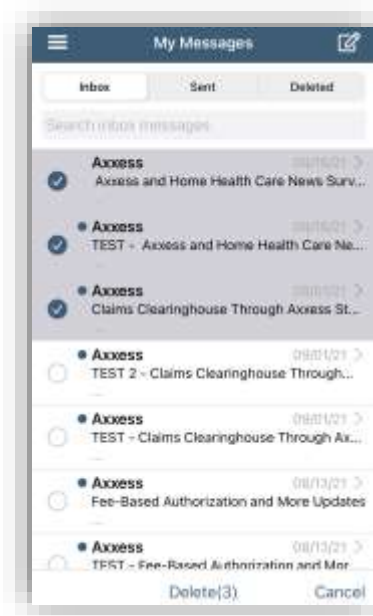
date, along with the total number of unread messages. Unread messages have a blue dot to the left. Swipe down to refresh the screen. To search through the messages, start typing in the text space below the tabs.



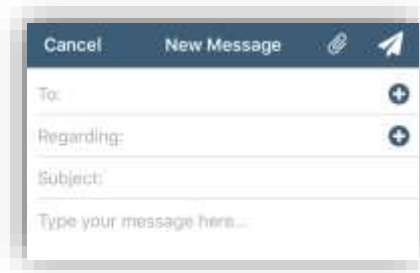
Tap on a message to view. Tap on the trash  icon in the bottom left to remove the message. Tap on **My Messages** in the top left to get back to the list.



To remove multiple messages at the same time, tap on **Edit** in the bottom right. Then select one or more messages by tapping on them (tap to unselect). They will have blue check-marks to the left. Choose all messages to be removed, then tap **Delete**(_) at the bottom of the page (the number in parentheses is how many messages are selected).





To write a new message tap on the  icon. Start typing the name of the user that is being sent the message in the To section. To search through the list of users, tap the blue plus (+) icon on the right.



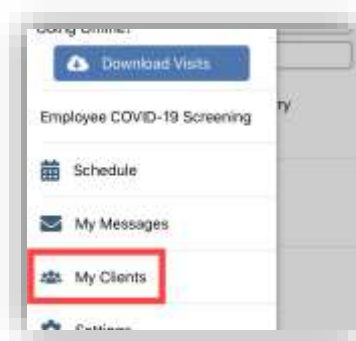
Search through the list by users or tags, tap on the users/tags to be included in the message.



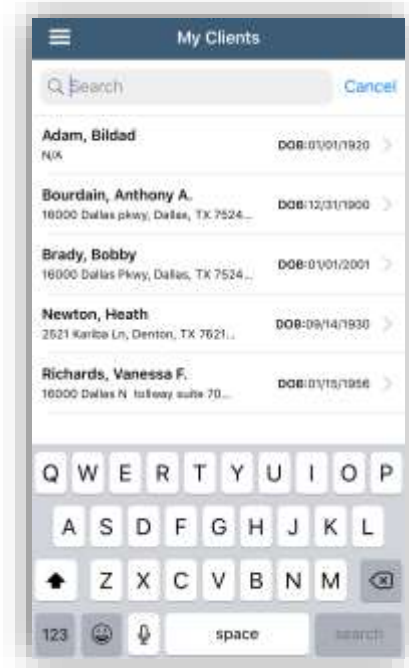
Once addressing who the message is going to, attach a specific client (optional) by typing their name in the Regarding section or tapping the blue plus (+) sign to the right to search for a client. Type in a Subject, then continue on with the body text of the message where it says “Type your message here...” Attachments can also be added by tapping the  icon in the top right. After tapping the icon, choose to either **Take a photo** on the app or use a previously taken image in **Choose from Photo Library**. When the message is complete, tap the send  icon.

MY CLIENTS

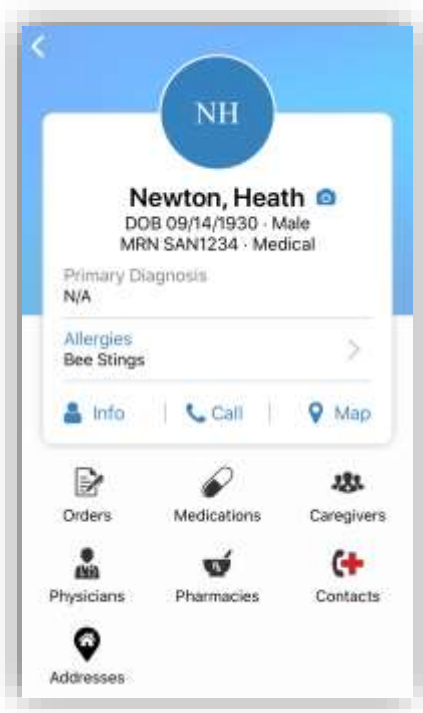
My Clients is listed after My Messages. Users can search and view their list of clients.



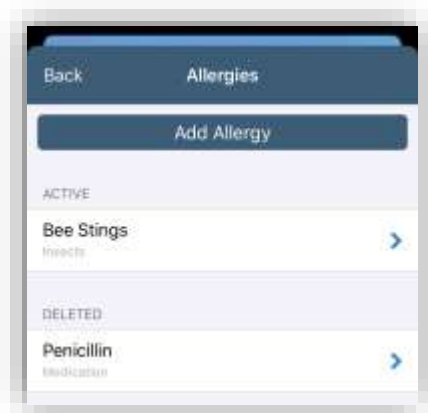
Users can search and view their list of clients.



Once the requested client has been found, tap on the name to view the client profile.



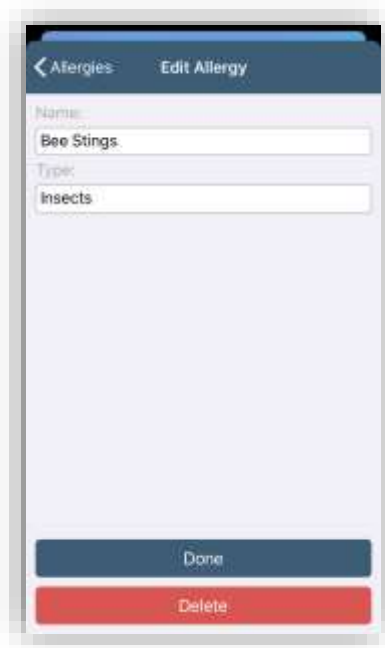
Tap **Allergies** to make updates to the allergies list.



Tap **Add Allergy** to add additional allergies. Enter Name and tap inside Type to see a list of categories. When finished tap the **Done** button or tap **Add Another** button to add more allergies.



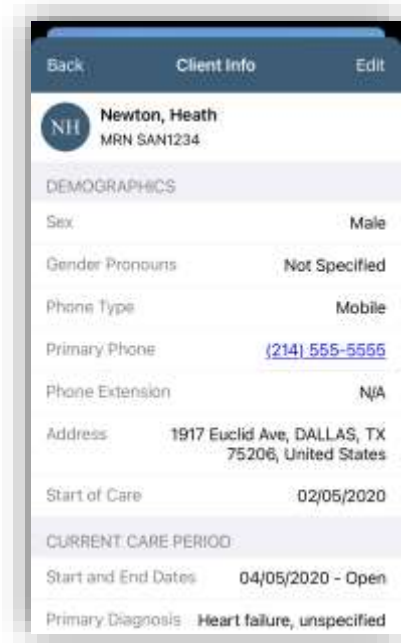
From the Allergies list screen, tap any ACTIVE allergies to make edits to Name or Type, when completed, tap **Done**. Tap the **Delete** button to remove.




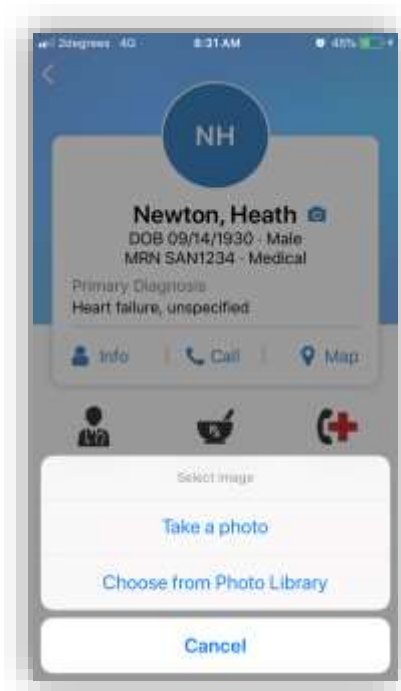
Tap any DELETED allergies and then tap the **Restore** button to turn into an active allergy.



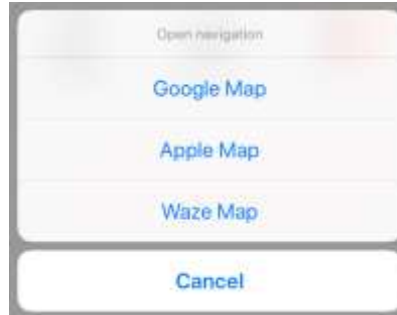
Users can view specific client info including demographics, medical record, etc by tapping **Info**. Make changes by tapping **Edit** in the top right.



From the Client Profile, users can add a client profile image from the library or camera by tapping the  icon.



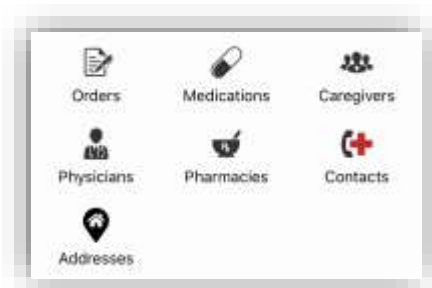
Navigate to the client's location by tapping the **Map** button and then choose from downloaded mapping apps.



Users can also call the client's directly from the Client Profile by tapping the **Call** button.

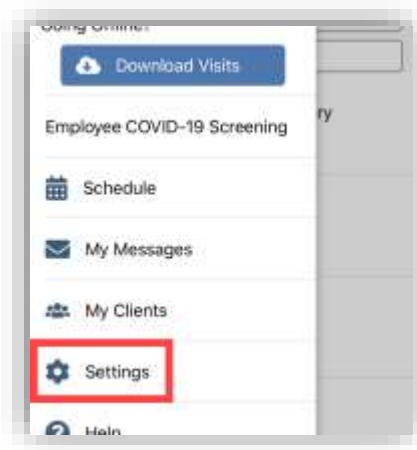


Tap **Orders**, **Medications**, **Addresses** and **Pharmacies** to view lists. Tap **Caregivers**, **Physicians**, **Contacts** to view lists and also has quick links to call directly from the app.



SETTINGS

The Settings area is found on the side menu.



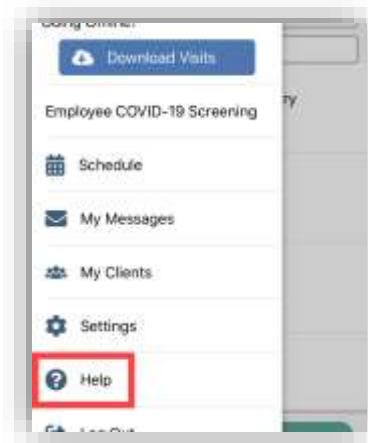
Users can decide if they would like to use Touch ID for logging into the app or to use only Wi-Fi for downloading/syncing by switching on.



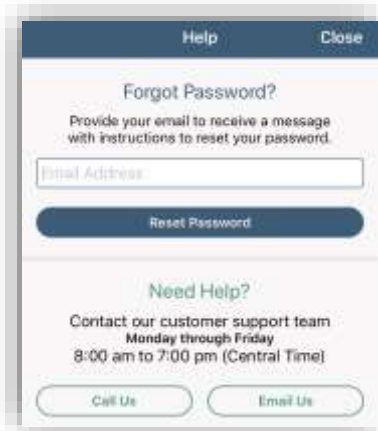
Caregivers can set their mobile devices to Spanish to view Spanish translations. Once the primary language on a caregiver's device is set to Spanish, the caregiver can log in to the mobile app to view menu items, error messages and labels in Spanish.

HELP

The Help area is found on the side menu.



The top section is to reset the password. Enter the email address associated with the account and tap **Reset Password**. To call Axxess Support, we are available Monday – Friday from 8:00 am – 7:00 pm CT.



Tap on **Call Us** to auto-dial the Axxess support phone number.