

HOME CARE ORDERS MANAGEMENT OVERVIEW MANUAL

January 2022

Table of Contents

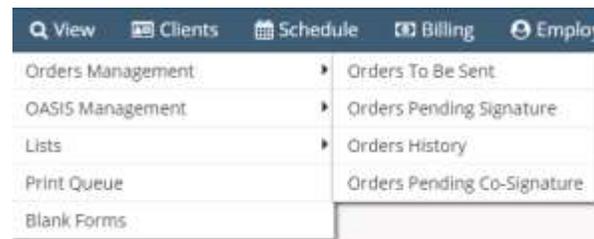
ORDERS MANAGEMENT OVERVIEW.....	3
Links in Orders Management	3
Orders Management Notes	4
ORDERS TO BE SENT	5
Printing and Marking Orders as Sent	5
ORDERS PENDING SIGNATURE	6
Receiving Orders.....	7
ORDERS HISTORY.....	7
ORDERS PENDING CO-SIGNATURE.....	9
HELP CENTER.....	11

ORDERS MANAGEMENT OVERVIEW

View/Orders Management

Orders Management is where approved orders are processed to and from the physicians. You can access Orders Management through the menu bar. The Orders Management center is where users can access sub-menus that include:

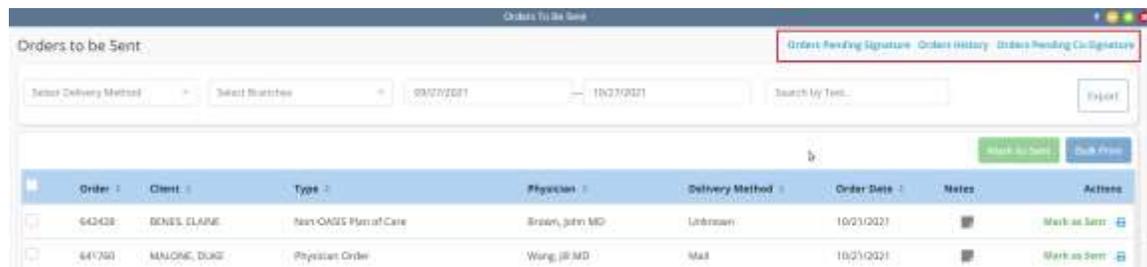
- Orders To Be Sent
- Orders Pending Signature
- Orders History
- Orders Pending Co-Signature



Links in Orders Management

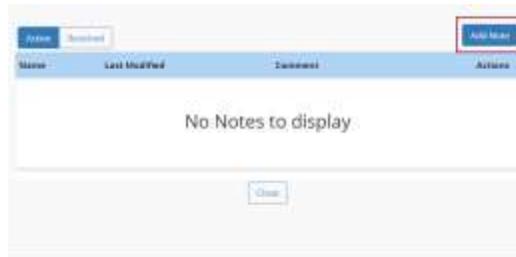
To view the Orders Management screens, navigate to the View tab, hover over Orders Management and select Orders to Be Sent, Orders Pending Signature or Orders History.

Navigation links now appear in the top-right corner of each screen. Users can click these links to navigate to the corresponding pages.



Orders Management Notes

To enter notes for an order, click the note icon in the Notes column. To enter a new note, click Add Note, type in the text box and click Save & Close or Save & Add Another.

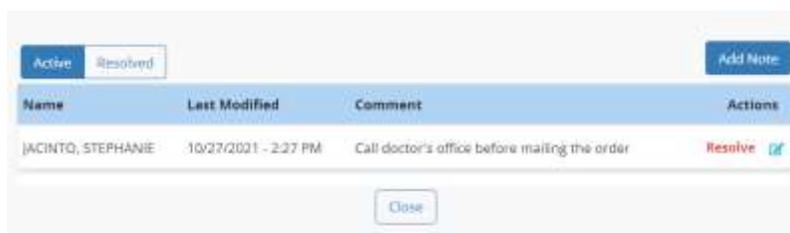


Once a note has been entered, the note icon will turn blue.

Hover over the blue note icon to view the notes entered. Up to three notes can be viewed when hovering over the icon. To view additional notes, click the note icon.



To edit a note, select . To resolve a note, select Resolve.



To view all resolved notes, click the resolved filter. The note icon will turn green once resolved.

ORDERS TO BE SENT

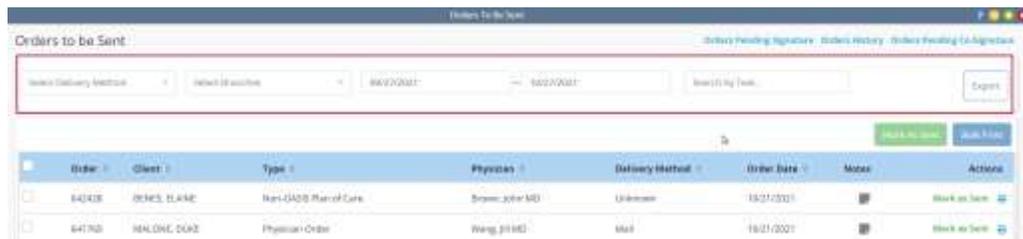
View/Orders Management/Orders to be Sent

The Orders to be Sent screen will populate the items ready to be sent to the physician manually (fax, mail, deliver).

NOTE: Electronic orders are currently under development.

Within the orders sent screen, sort and filter by the items below.

- Delivery Method - Defaults to all. Choose between Axxess Portal, Fax and Mail.
- Branch - Filter by location/branch (if more than one).
- Date Range - Defaults to the last 60 days from the current date. The date range may be changed. To update the orders displaying, select **Refresh**.
- Filter by Text - Allows the user to search the table by any data listed - order number, patient, type etc.
- Export - This function allows the generated list to be exported to Excel for further analysis.



Order	Client	Type	Physician	Delivery Method	Order Date	Notes	Actions
64343	JAMES BLAKE	Non-OBG Plan of Care	Brown, John MD	Unknown	10/27/2021		Mark as Sent
64782	HEALING DAZE	Physician Order	Wang, PH MD	Mail	10/21/2021		Mark as Sent

Once the order list is generated, it may be sorted by any of the column headers, Order, Client, Type, Physician, Delivery Method or Order Date.

Printing and Marking Orders as Sent

- Individual orders may be printed by selecting the  icon in the far-right column.
- Multiple orders may be printed by using the bulk print feature. Simply select the orders the user wishes to print. Then select **Bulk Print**. The list of orders will be queued in *Reports/Completed Reports*.

Once the orders are printed, the user updates the orders by selecting **Mark as Sent**. Orders marked as sent to physician move to the Orders Pending Signature submenu. The order is also updated to a “Sent to Physician” status in the Client chart.

Receiving Orders

Individual orders may be received by selecting **Receive Order** in the far right-hand column of the order. A pop-up will display to enter the Received Date and Physician Signature Date. Once completed, select the **Update** button.



Select multiple orders at one time to mark as received. Select the applicable orders on the far left-hand side and select **Mark Selected as Received**. A pop-up will display to confirm the Received Date and Physician Signature Date. These dates auto-generate to the current date. Once completed, select the **Mark** button.



Once an order is marked as Received, it moves to the Order History screen. The order will also be updated in the patient chart to indicate “Returned W/ Physician Signature.”

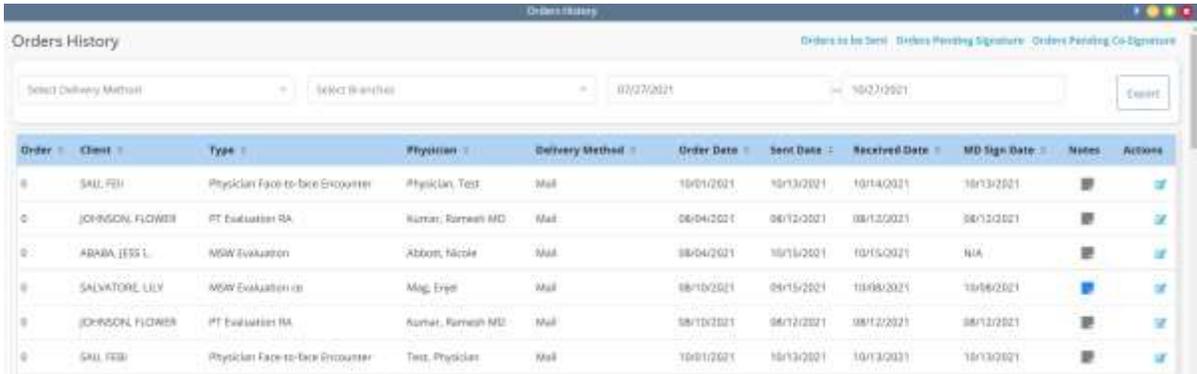
ORDERS HISTORY

View/Orders Management/Orders History

Once an order is marked as Received, it moves from the Pending Signature screen to the Orders History screen. The order also updates to “Returned W/ Physician Signature” in the Client chart.

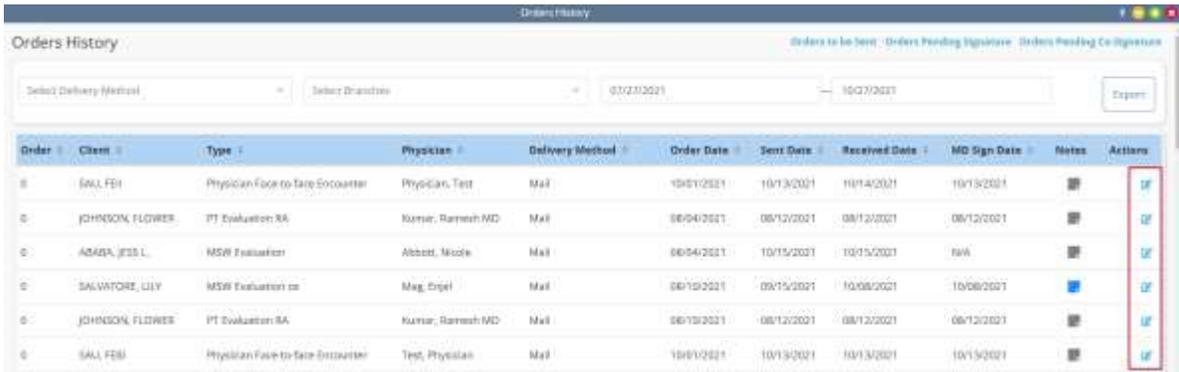
- Delivery Method - Defaults to All. Choose between Axxess Portal, Fax and Mail.
- Branch - Filter by location/branch (if more than one).
- Date Range - Defaults to the last 60 days from the current date. The date range may be changed. To update the orders displaying, select **Refresh**.

- **Export** - This function allows the generated list to be exported to Excel for further analysis.
- Selecting a column title will sort the list by that heading.



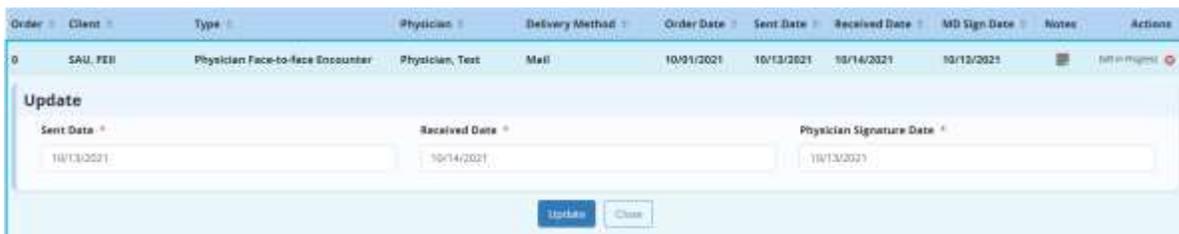
Order	Client	Type	Physician	Delivery Method	Order Date	Sent Date	Received Date	MD Sign Date	Notes	Actions
8	SAUL FERI	Physician Face-to-face Encounter	Physician, Test	Mail	10/01/2021	10/13/2021	10/14/2021	10/13/2021		
0	JOHNSON, FLOWER	PT Evaluation RA	Kumar, Ramesh MD	Mail	08/04/2021	08/12/2021	08/12/2021	08/12/2021		
0	ARABA, JESS L.	MSW Evaluation	Abbott, Nicole	Mail	08/04/2021	10/15/2021	10/15/2021	N/A		
0	SALVATORE, LILY	MSW Evaluation co	Mag, Engel	Mail	08/10/2021	09/15/2021	10/08/2021	10/08/2021		
0	JOHNSON, FLOWER	PT Evaluation RA	Kumar, Ramesh MD	Mail	08/10/2021	08/12/2021	08/12/2021	08/12/2021		
0	SAUL FERI	Physician Face-to-face Encounter	Test, Physician	Mail	10/01/2021	10/13/2021	10/13/2021	10/13/2021		

If the order Sent Date, Received Date or MD Sign Date was entered incorrectly, corrections can be made by selecting the  in the Action column. Upon selection, a pop-up window appears, allowing updates to one or all the dates.



Order	Client	Type	Physician	Delivery Method	Order Date	Sent Date	Received Date	MD Sign Date	Notes	Actions
8	SAUL FERI	Physician Face-to-face Encounter	Physician, Test	Mail	10/01/2021	10/13/2021	10/14/2021	10/13/2021		
0	JOHNSON, FLOWER	PT Evaluation RA	Kumar, Ramesh MD	Mail	08/04/2021	08/12/2021	08/12/2021	08/12/2021		
0	ARABA, JESS L.	MSW Evaluation	Abbott, Nicole	Mail	08/04/2021	10/15/2021	10/15/2021	N/A		
0	SALVATORE, LILY	MSW Evaluation co	Mag, Engel	Mail	08/10/2021	09/15/2021	10/08/2021	10/08/2021		
0	JOHNSON, FLOWER	PT Evaluation RA	Kumar, Ramesh MD	Mail	08/10/2021	08/12/2021	08/12/2021	08/12/2021		
0	SAUL FERI	Physician Face-to-face Encounter	Test, Physician	Mail	10/01/2021	10/13/2021	10/13/2021	10/13/2021		

Selecting **Update** will save the changes and **Close** will discard any changes to the record.



Order	Client	Type	Physician	Delivery Method	Order Date	Sent Date	Received Date	MD Sign Date	Notes	Actions
0	SAUL FERI	Physician Face-to-face Encounter	Physician, Test	Mail	10/01/2021	10/13/2021	10/14/2021	10/13/2021		Edit in History

Update

Sent Date *

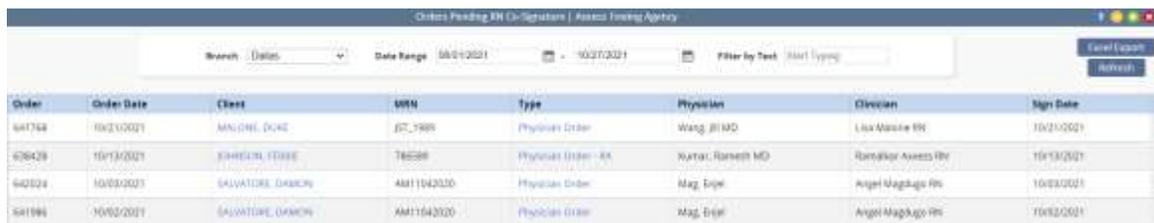
Received Date *

Physician Signature Date *

ORDERS PENDING CO-SIGNATURE

View/Orders Management/Orders Pending Co-Signature

User permissions allows the organization to set up specific users to require co-signature on all orders. Users can filter for Branch, Date Range, as well as search for a Patient name. Selecting a column title will sort the list by title. Select **Refresh** once filters have been updated. The information can also be exported to Microsoft Excel for further analysis by selecting **Excel Export**.



Order	Order Date	Client	MRN	Type	Physician	Clinician	Sign Date
64174	10/21/2021	MA/DRE, DCHC	07_798	Physician Order	Wang, JIHO	Lisa Masche RN	10/21/2021
63843	10/13/2021	ERNESTO, STEVE	78058	Physician Order - RA	Kumar, Ramesh MD	Ramakar Axxess RN	10/13/2021
64034	10/03/2021	SALVATORE, DANNON	AM11042020	Physician Order	Mag, Dije	Angel Magdugo RN	10/03/2021
64196	10/02/2021	SALVATORE, DANNON	AM11042020	Physician Order	Mag, Dije	Angel Magdugo RN	10/02/2021

Both the **Client Name** and **Type** items listed are hyperlinks.

The **Client Name** hyperlink navigates the user to the *Clients/Client Center* while the **Type** hyperlink opens the order for review and ability to **Co-Sign** the note, **Return** to the caregiver, **Download**, **Print** or **Close**.

Axxess Testing Agency 16000 Dallas Parkway suite 700 DALLAS, TX, 75248-9999 Phone: (214) 575-7711 Fax: (789) 797-7979		PHYSICIAN ORDER	
Client Name: Johnson, Ryan L. 16000 Dallas Pkwy Dallas, TX, 75248-7524 (214) 111-1111		Physician: KUMAR, RAMESH 3 Plaza Drive Suite 16 Toms River, TX, 08757 Phone: (732) 505-2888 Fax: (732) 505-2850 NPI: 1114000114	
MRN: 22222 DOB: 01/13/1952		Order Date: 07/31/2020 05:30 PM Order #: 441855 Care Period: 07/31/2020 - 08/29/2020	
Allergies: New Added, Cough, Allergy Added, New Summary: RA -Order			
PEMIGATINIB 13.5 MG ORAL TABLET Twice/day By mouth (PO)			
Co-Sign Return Download Print Close			

After **Co-Sign** is selected, a confirmation box will appear. Enter the Clinician's Co-Signature & Clinician's Co-Signature Date (auto-generates to today). Select either **Co-Sign** or **Co-Sign and Approve** based on permissions and the organization's policy. If **Co-Sign** is selected, the order will flow to the QA Center

for approval. If **Co-Sign and Approve** is selected, the order bypasses the QA center and gets approved.



The screenshot shows a web form titled "Co-Signature" with a red asterisk indicating required fields. The form contains the following fields and values:

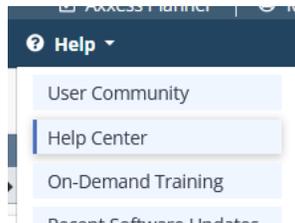
Field	Value
Order Number:	638428
Client Name:	JOHNSON, FERRIE
Created Date:	10/13/2021
Clinician Co-Signature:	<input type="text"/>
Clinician Co-Signature Date:	10/27/2021
Clinician Co-Signature Time:	02:48 PM

At the bottom of the form, there are three buttons: "Co-Sign", "Co-Sign And Approve", and "Exit".

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/>

