

# HOME CARE OVERVIEW TRAINING MANUAL

January 2022

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## LOGIN TO AXXESS

Navigate to [www.axxess.com](http://www.axxess.com). Select the **LOGIN** button.

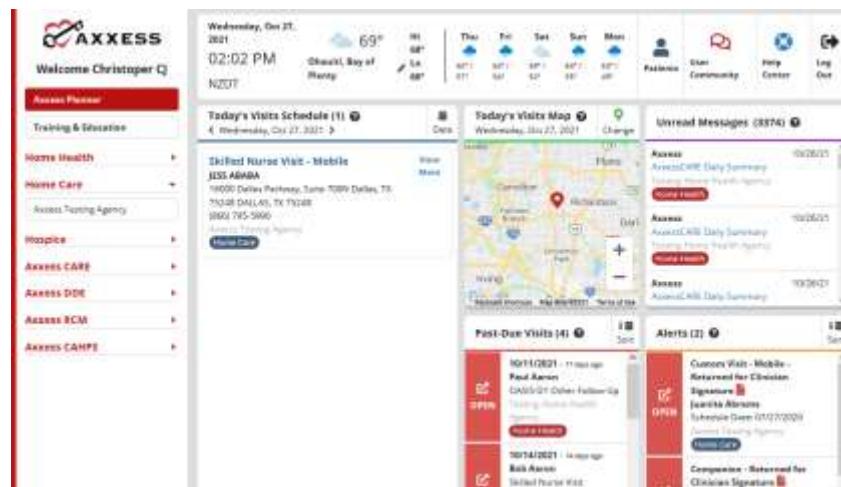


Input user credentials and select the **Secure Login** button.



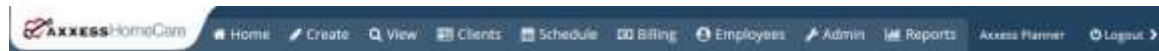
## AXXESS PLANNER

The Axxess Planner displays pertinent information specific to a user. Shortcuts have been placed on the left side of the page to allow for easy access to the Axxess applications the organization is using. Clinicians can also see upcoming visits, past due visits, unread messages, and a map of today's visits. To access client charts, document a visit or bill for a particular client, select the appropriate Axxess application on the left side of the page.



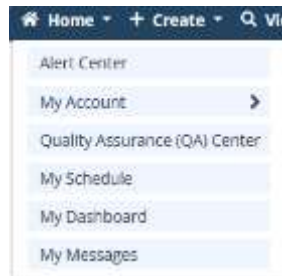
## NAVIGATION MENU

Once logged in, the navigation menu at the top will allow for easy access to the data.

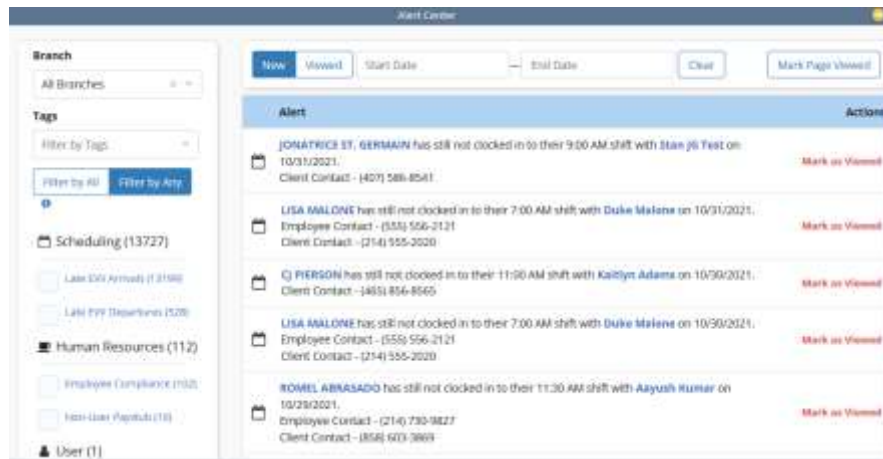


### Home

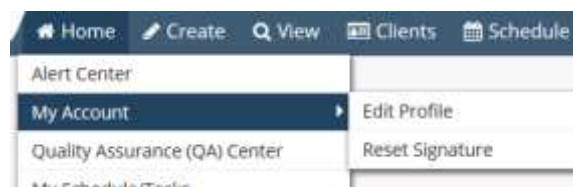
The Home menu allows access to the following actions based on permissions granted to the user.



**Alert Center** - Various administrative alerts are generated in this screen for an organization to act on.



**My Account** - Users can quickly edit their profile or reset their signature.



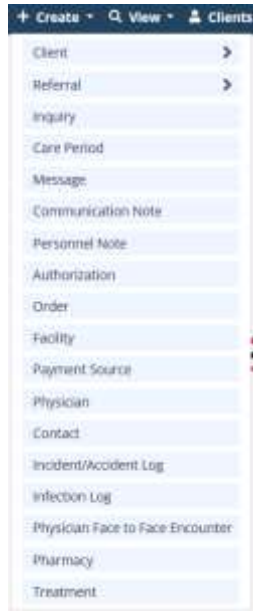


**My Messages** - Opens the Message Center to view/send messages.

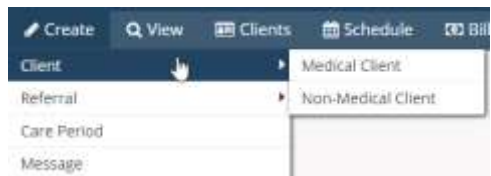


**Create**

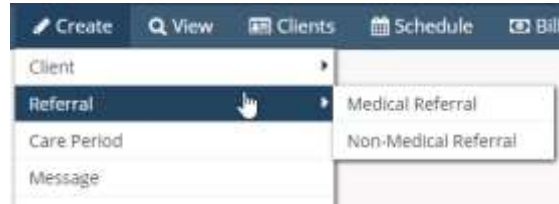
The **Create** menu allows access to the following actions based on permissions granted to the user.



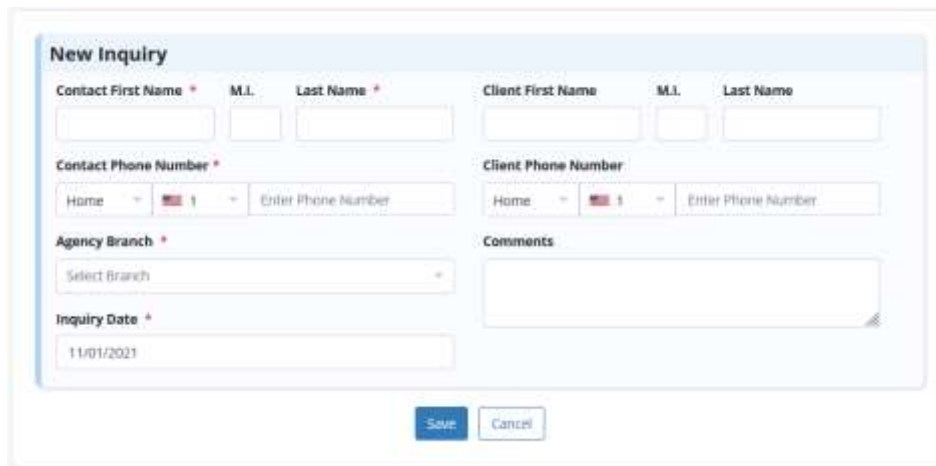
**Client** - Allows a user to create either a Medical or Non-Medical Client.



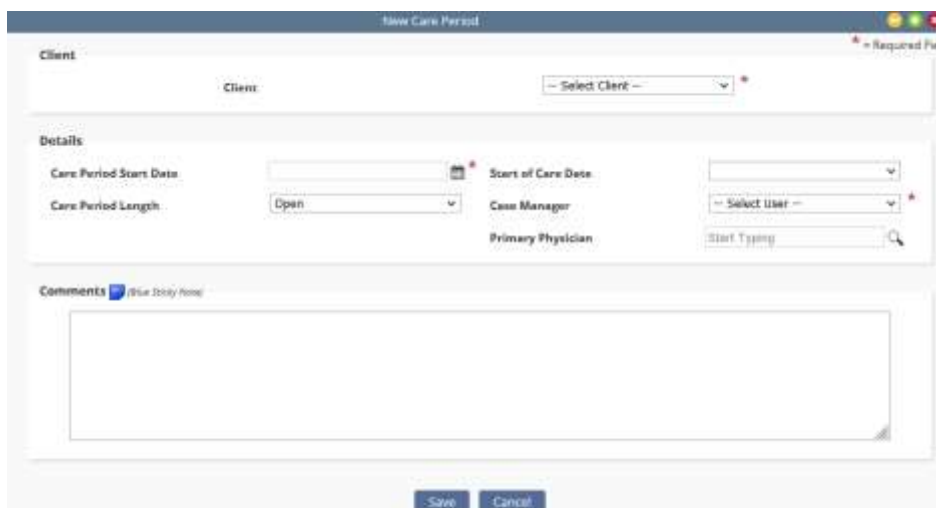
**Referral** - Create either a Medical or Non-Medical Referral.



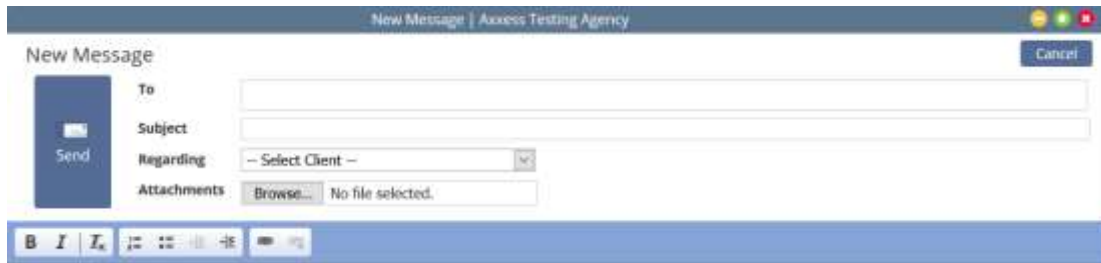
**Inquiry** - Opens a new window that allows a user to create a new inquiry for a potential client.

A screenshot of a 'New Inquiry' form. The form is divided into two columns. The left column contains fields for 'Contact First Name', 'M.I.', 'Last Name', 'Contact Phone Number' (with a dropdown for 'Home' and a country code selector), 'Agency Branch' (a dropdown menu), and 'Inquiry Date'. The right column contains fields for 'Client First Name', 'M.I.', 'Last Name', 'Client Phone Number' (with a dropdown for 'Home' and a country code selector), and a 'Comments' text area. At the bottom of the form are 'Save' and 'Cancel' buttons.

**Care Period** - Opens a new window that allows a user to create a care period for a client.

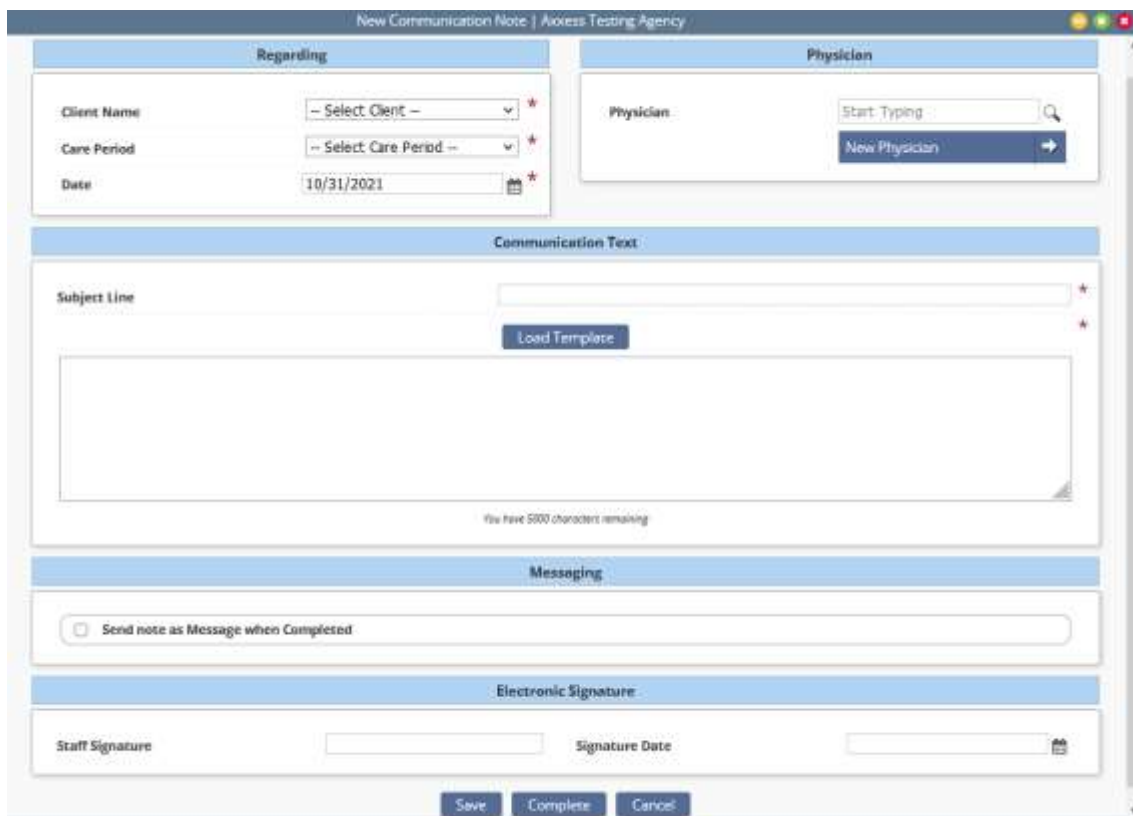
A screenshot of a 'New Care Period' form. The form has a title bar 'New Care Period' and a 'Client' dropdown menu. Below this is a 'Details' section with fields for 'Care Period Start Date', 'Care Period Length' (a dropdown menu), 'Start of Care Date', 'Case Manager' (a dropdown menu), and 'Primary Physician' (a search field). There is also a 'Comments' text area with a 'Rich Texty Note' icon. At the bottom are 'Save' and 'Cancel' buttons.

**Message** - Opens a blank message to compose to another user in the system.



The screenshot shows a window titled "New Message | Access Testing Agency". The window contains a "Send" button on the left and a "Cancel" button on the right. The main area has fields for "To", "Subject", "Regarding" (with a dropdown menu showing "-- Select Client --"), and "Attachments" (with a "Browse..." button and "No file selected." text). At the bottom, there is a rich text editor toolbar with icons for bold, italic, underline, bulleted list, numbered list, link, unlink, and text color.

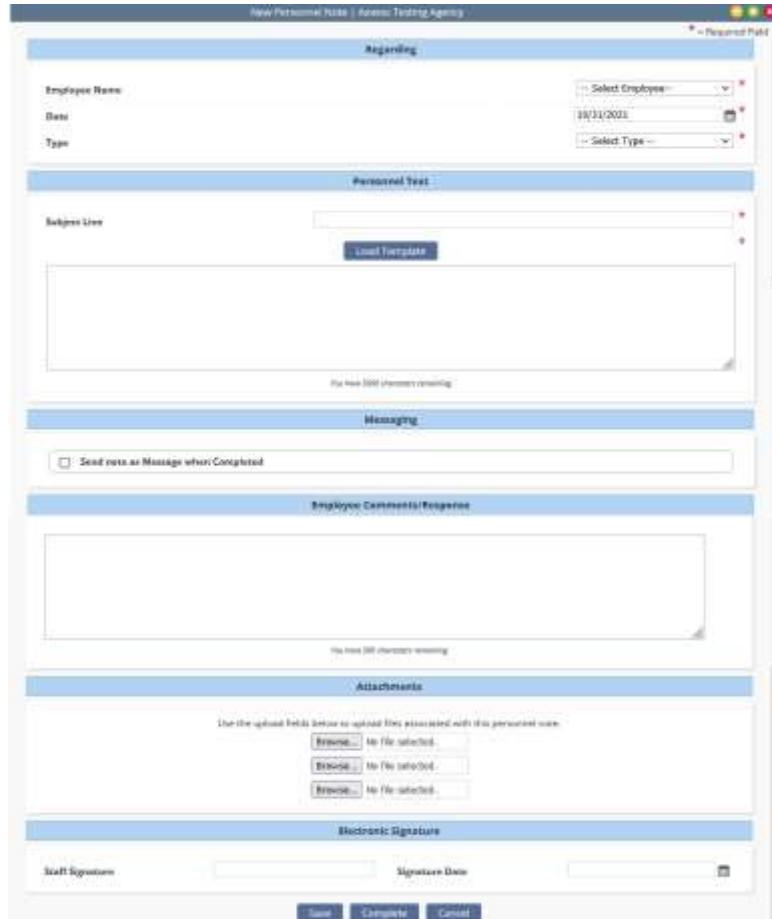
**Communication Note** - Creates a new communication note for a specific client/care period.



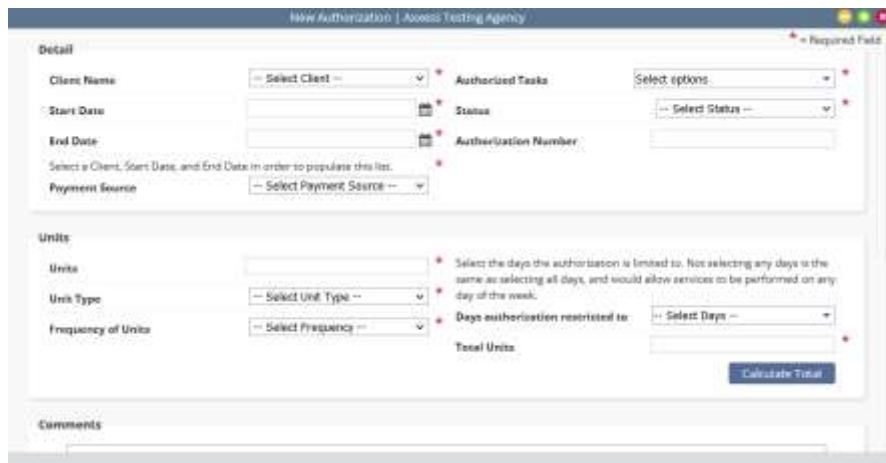
The screenshot shows a window titled "New Communication Note | Access Testing Agency". The window is divided into several sections: "Regarding" (with fields for Client Name, Care Period, and Date), "Physician" (with a search field and a "New Physician" button), "Communication Text" (with a "Subject Line" field, a "Load Template" button, and a large text area with a character count), "Messaging" (with a checkbox for "Send note as Message when Completed"), and "Electronic Signature" (with fields for Staff Signature and Signature Date). At the bottom, there are "Save", "Complete", and "Cancel" buttons.



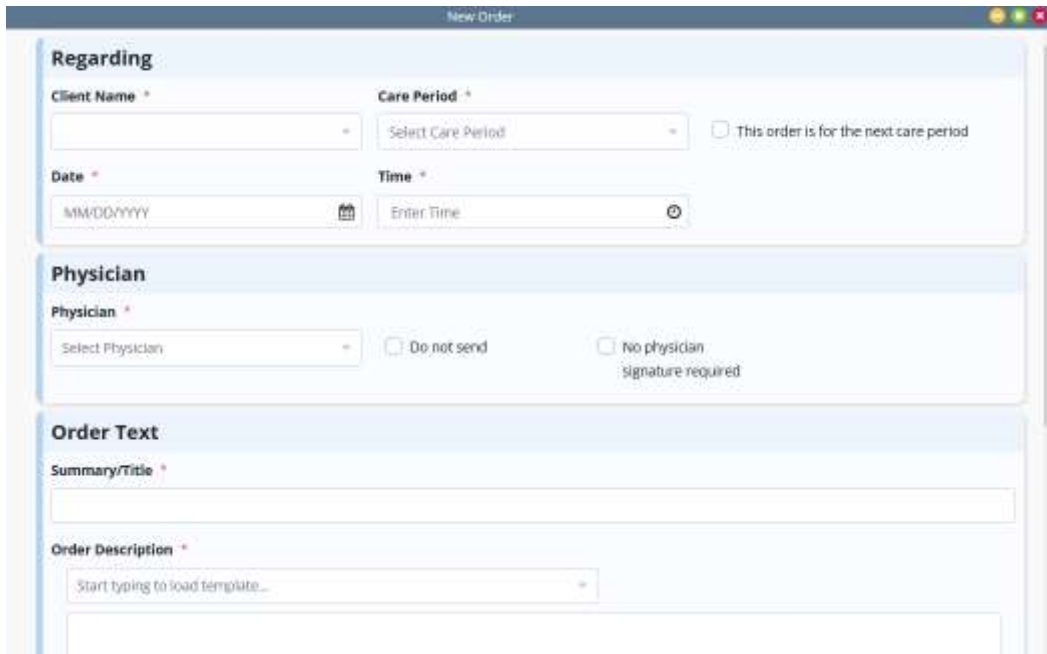
**Personnel Note** - The personnel note is permission-based and enables organizations to document employee communication



**Authorization** - Creates a new authorization detail for a specific client.



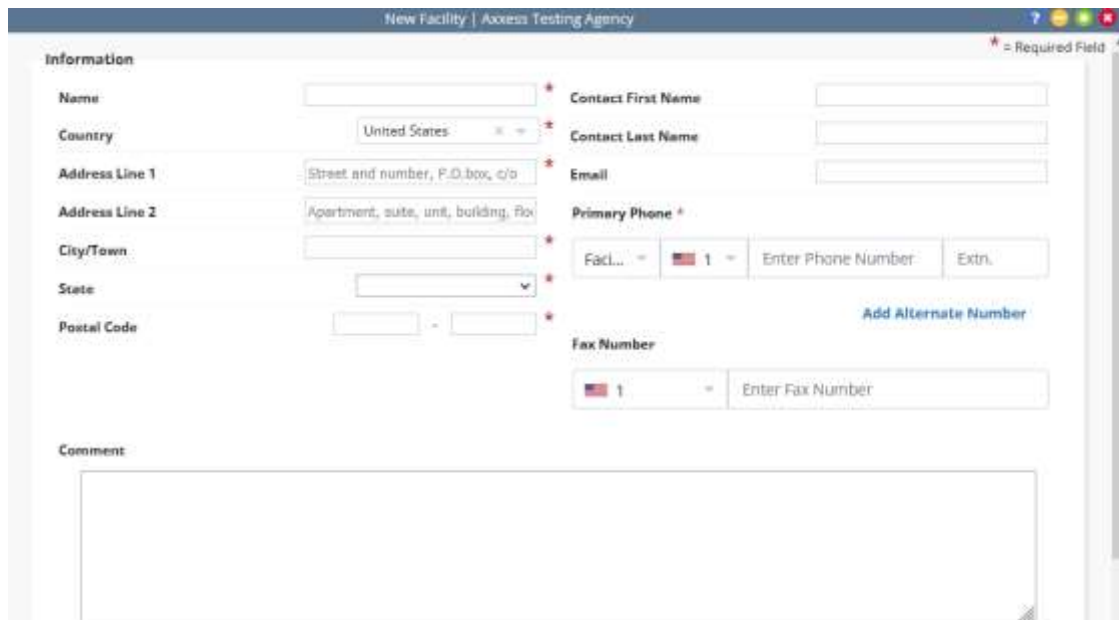
**Order** - Creates a new order for a specific client.



The 'New Order' form is divided into three main sections:

- Regarding:** Includes fields for 'Client Name', 'Care Period' (with a dropdown menu), and a checkbox for 'This order is for the next care period'. It also has 'Date' (MM/DD/YYYY) and 'Time' (Enter Time) fields.
- Physician:** Includes a 'Physician' dropdown menu, a 'Do not send' checkbox, and a 'No physician signature required' checkbox.
- Order Text:** Includes a 'Summary/Title' text area and an 'Order Description' dropdown menu with a placeholder 'Start typing to load template...'.

**Facility** - Creates a new facility within the Home Care system for selection.

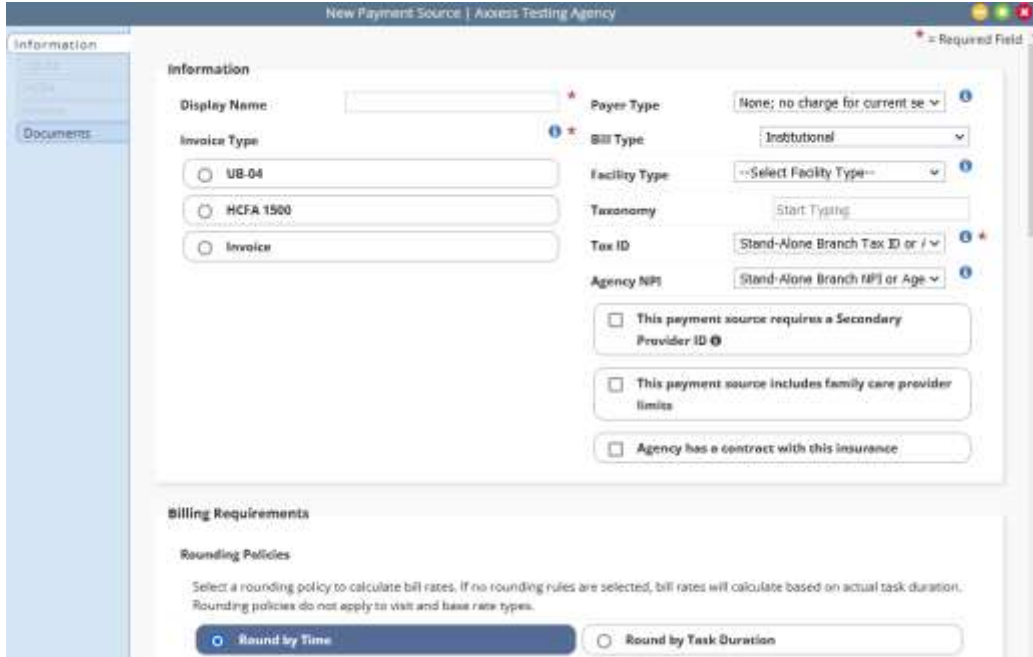


The 'New Facility' form is titled 'New Facility | Access Testing Agency' and includes a legend for required fields (\*). The form is organized into two columns:

- Information (Left Column):** Fields for Name, Country (United States), Address Line 1 (Street and number, P.O. box, c/o), Address Line 2 (Apartment, suite, unit, building, floor), City/Town, State, and Postal Code.
- Contact Information (Right Column):** Fields for Contact First Name, Contact Last Name, Email, Primary Phone (with a dropdown for country code '1', 'Enter Phone Number', and 'Extn.'), and Fax Number (with a dropdown for country code '1' and 'Enter Fax Number'). There is also a link for 'Add Alternate Number'.

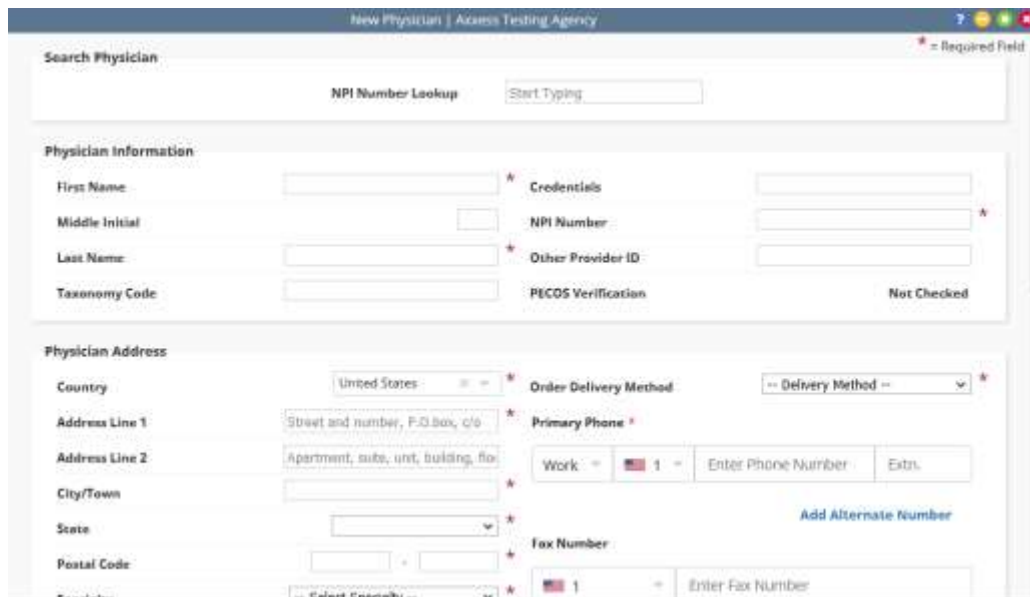
A 'Comment' text area is located at the bottom of the form.

**Payment Source** - Creates a new payment source within the Home Care system.



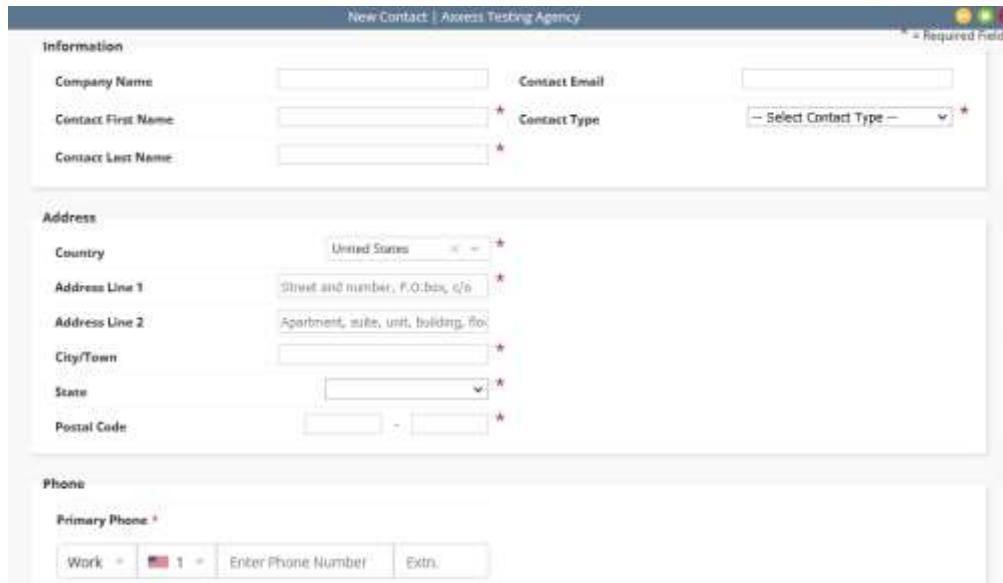
The screenshot shows the 'New Payment Source' form. The 'Information' section includes fields for Display Name, Invoice Type (with radio buttons for UB-04, HCFA 1500, and Invoice), Payer Type, Bill Type, Facility Type, Taxonomy, Tax ID, and Agency NPI. There are also three checkboxes: 'This payment source requires a Secondary Provider ID', 'This payment source includes family care provider limits', and 'Agency has a contract with this insurance'. The 'Billing Requirements' section includes 'Rounding Policies' with a note and two radio buttons: 'Round by Time' (selected) and 'Round by Task Duration'.

**Physician** - Creates a new physician within the Home Care system.



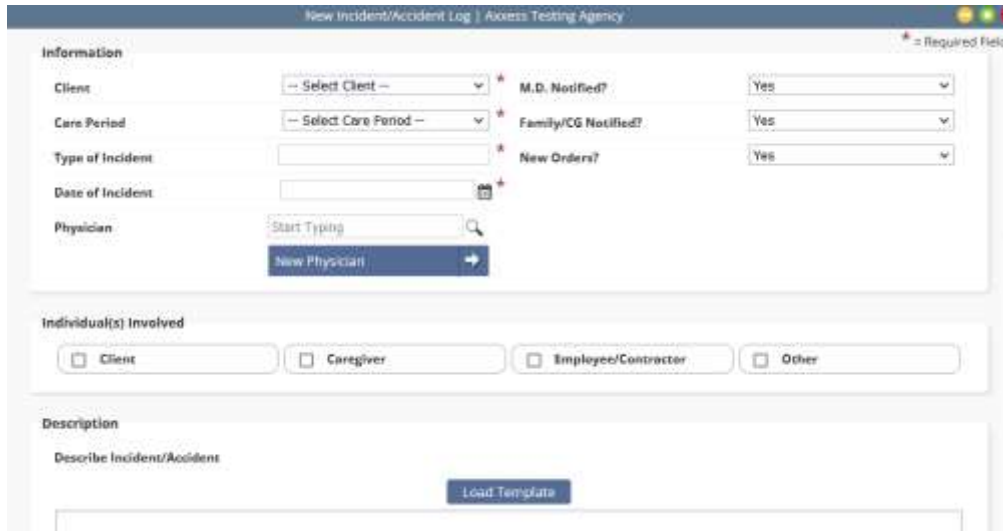
The screenshot shows the 'New Physician' form. It starts with a 'Search Physician' section containing an 'NPI Number Lookup' field. The 'Physician Information' section includes fields for First Name, Middle Initial, Last Name, Taxonomy Code, Credentials, NPI Number, Other Provider ID, and PECOS Verification (Not Checked). The 'Physician Address' section includes fields for Country, Address Line 1, Address Line 2, City/Town, State, Postal Code, Order Delivery Method, Primary Phone (with Work and Extn. options), and Fax Number (with an 'Add Alternate Number' link).

**Contact** - Creates a new contact within the Home Care system.



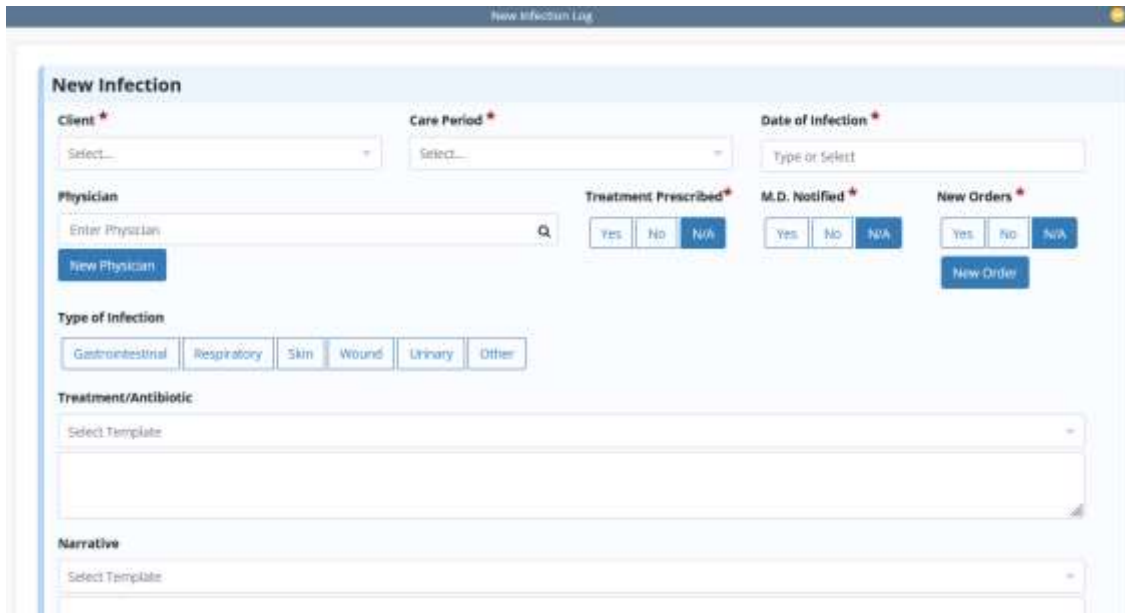
The screenshot shows a web application window titled "New Contact | Axxess Testing Agency". The form is divided into three main sections: Information, Address, and Phone. The Information section includes fields for Company Name, Contact First Name, Contact Last Name, Contact Email, and Contact Type (a dropdown menu). The Address section includes Country (a dropdown menu), Address Line 1, Address Line 2, City/Town, State (a dropdown menu), and Postal Code. The Phone section includes a Primary Phone field with a dropdown for "Work", a country code dropdown (currently showing "1"), an "Enter Phone Number" field, and an "Extra" field. Red asterisks indicate required fields.

**Incident/Accident Log** - Creates a new incident/accident log specific to a client.

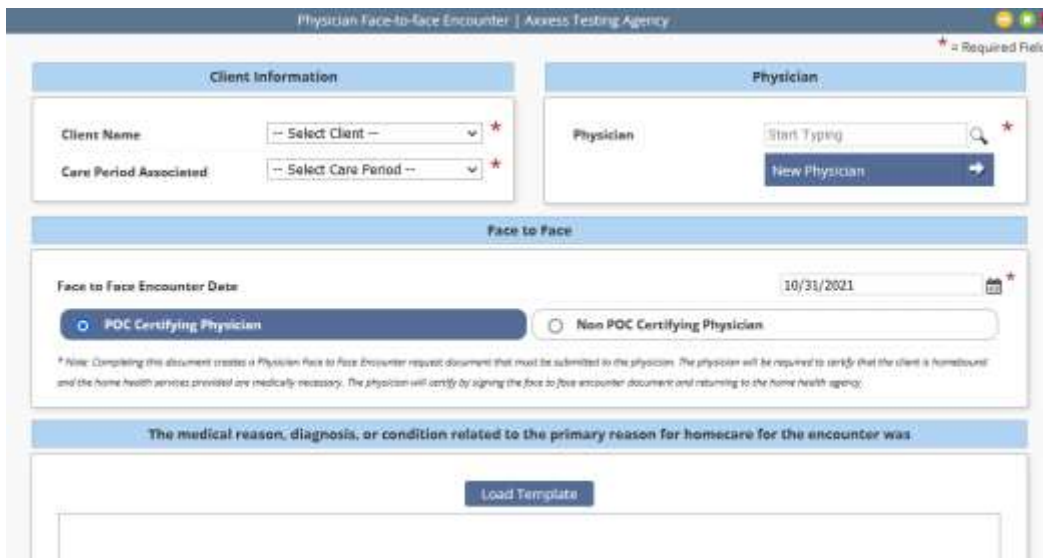


The screenshot shows a web application window titled "New Incident/Accident Log | Axxess Testing Agency". The form is divided into three main sections: Information, Individual(s) Involved, and Description. The Information section includes fields for Client (a dropdown menu), Care Period (a dropdown menu), Type of Incident, Date of Incident, Physician (a search field with a "New Physician" button), M.D. Notified?, Family/CG Notified?, and New Orders?. The Individual(s) Involved section includes checkboxes for Client, Caregiver, Employee/Contractor, and Other. The Description section includes a text area for "Describe Incident/Accident" and a "Load Template" button. Red asterisks indicate required fields.

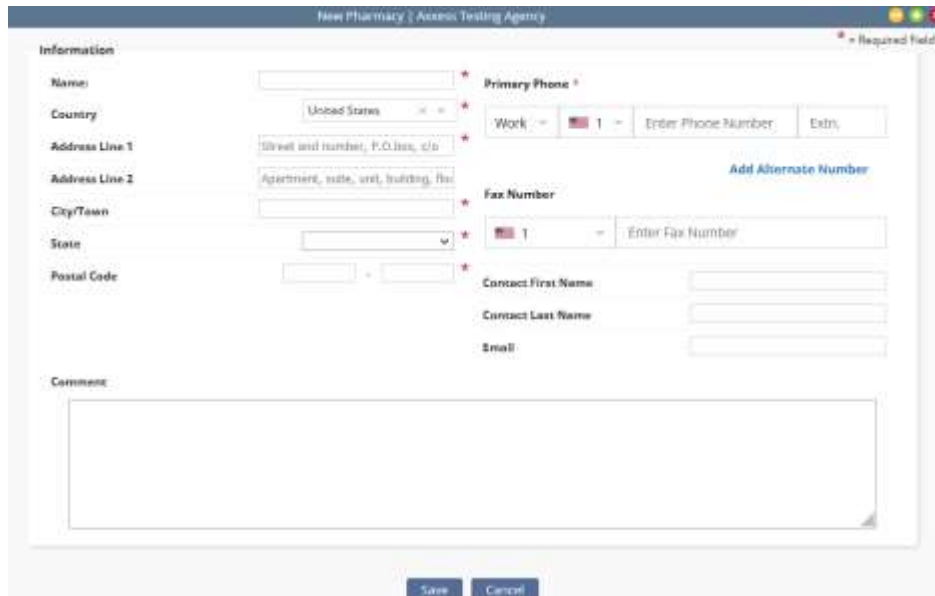
**Infection Log** - Creates an infection log record for a specific client.



**Physician Face to Face Encounter** - Creates the face-to-face encounter documentation for a specific client/care period.



**Pharmacy** - Creates a new pharmacy within the Home Care system.

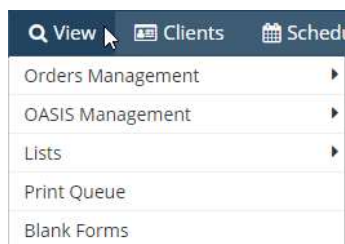


**Treatment** - Creates a new treatment within the Home Care system.

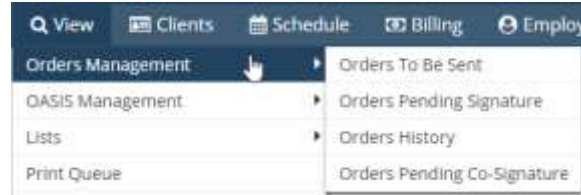


## View

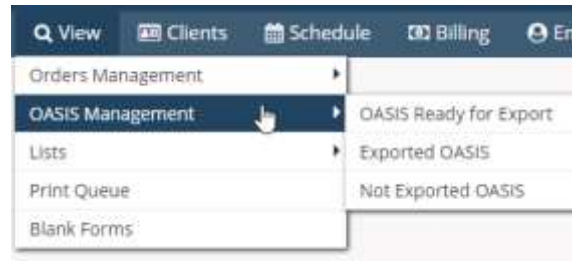
The **View** menu allows access to the following actions based on permissions granted to the user.



**Orders Management** - View orders that are pending co-signature, pending physician signature, orders to be sent and orders history.



**OASIS Management** - Location to review OASIS ready for export, OASIS previously exported and OASIS that have not been exported.



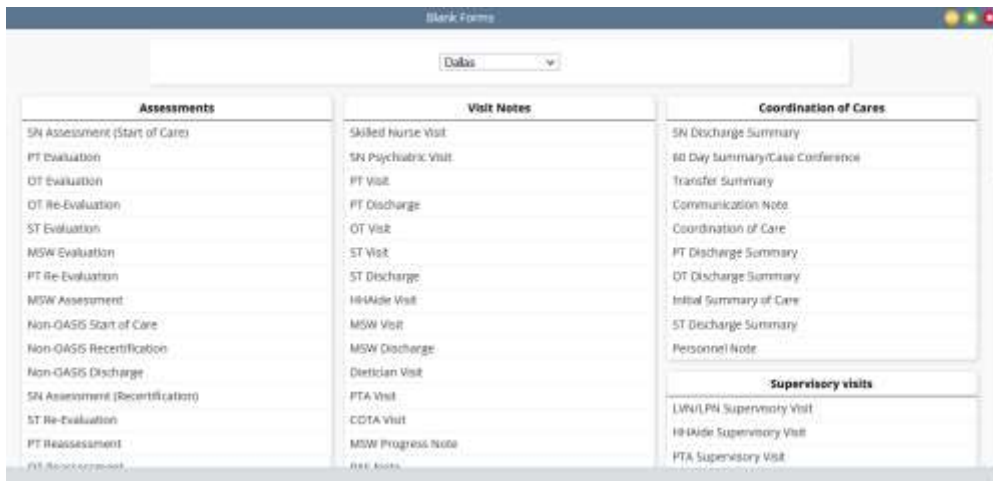
**Lists** - View items in the system, such as a list of Referrals, Clients, Physicians, Payment Sources, etc.



**Print Queue** - Displays tasks that are ready to be printed and delivered to the appropriate recipient.

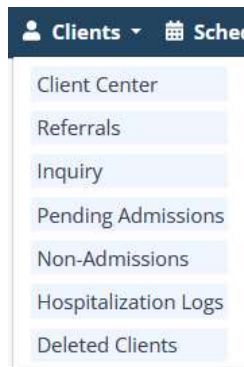


**Blank Forms** - View blank versions of visits to be printed and filled out manually.



## Clients

The **Clients** menu allows access to the following actions based on permissions granted to the user.





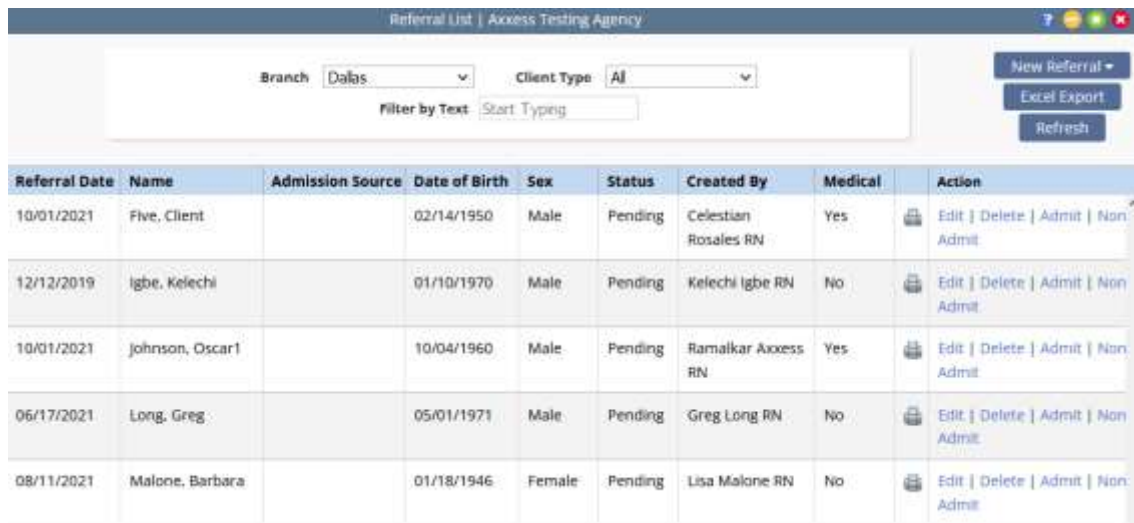
**Client Center** - View client charts within the system, including Active, Pending, Discharged, Non-Admitted and Hospitalized clients.



The screenshot shows the 'Client Center' interface for 'Access Testing Agency'. It features a sidebar with filters for Branch, Status, Type, Payer, and Tags. The main area displays the client's profile for 'ABABA, JESS L.', including a cartoon avatar, gender (Female), age (41), MRN (GDS11192020), physician (Abbott, Nicole), DOB (03/12/1980), SOC (07/23/2021), and phone number (866) 755-5990. Below the profile is a table of tasks:

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

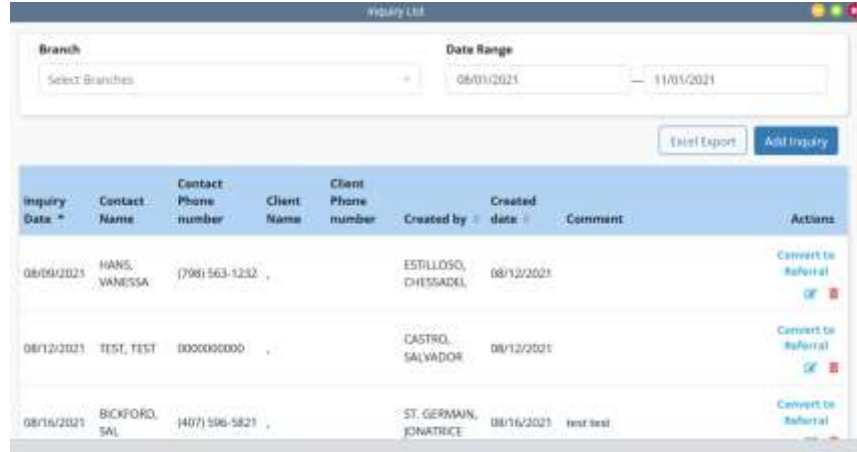
**Referrals** - View a list of pending referrals and begin the admission process.



The screenshot shows the 'Referral List' interface for 'Access Testing Agency'. It includes filters for Branch (Dallas) and Client Type (All), along with a 'Filter by Text' search box. A table lists pending referrals with the following data:

Referral Date	Name	Admission Source	Date of Birth	Sex	Status	Created By	Medical	Action
10/01/2021	Five, Client		02/14/1950	Male	Pending	Celestian Rosales RN	Yes	[Action icons]
12/12/2019	Igbe, Kelechi		01/10/1970	Male	Pending	Kelechi Igbe RN	No	[Action icons]
10/01/2021	Johnson, Oscar I		10/04/1960	Male	Pending	Ramalkar Axxess RN	Yes	[Action icons]
06/17/2021	Long, Greg		05/01/1971	Male	Pending	Greg Long RN	No	[Action icons]
08/11/2021	Malone, Barbara		01/18/1946	Female	Pending	Lisa Malone RN	No	[Action icons]

**Inquiries** - View a list of inquiries to be edited, converted into referrals or removed.



Inquiry Date	Contact Name	Contact Phone number	Client Name	Client Phone number	Created by	Created date	Comment	Actions
08/09/2021	HANS, VANESSA	(798) 563-1232			ESTILLOSO, CHESSADEL	08/12/2021		Convert to Referral
08/12/2021	TEST, TEST	0000000000			CASTRO, SALVADOR	08/12/2021		Convert to Referral
08/16/2021	BICKFORD, SAL	(407) 596-5821			ST. GERMAIN, JONATRICE	08/16/2021	test test	Convert to Referral

**Pending Admissions** - View and add new clients for admission into the system.



MRN	Client	Referral Source	Sex	Medical	Branch	Req. SOC	Zip	Action
N10132020	jason.anna@q		Male	Yes	Dallas	10/13/2020	15784	Edit   Admit   Non-Admit
12345678	Ahmadi, yashin		Female	Yes	Dallas	07/14/2021	75248	Edit   Admit   Non-Admit
AC10122001	Clement, Dame		Male	Yes	Dallas	10/12/2021	75248	Edit   Admit   Non-Admit
RR02212145	Client, Pending		Male	Yes	Dallas	02/22/2021	75248	Edit   Admit   Non-Admit
343	dfdf, dfdfdf		Female	Yes	Dallas	02/21/2018	75243	Edit   Admit   Non-Admit
852	Dou, jane		Female	Yes	Dallas	01/19/2019	47130	Edit   Admit   Non-Admit

**Non-Admissions** - Inclusive list of all non-admissions logged in the system. From this screen, a user can also admit a client if they were marked incorrectly.



MRN	Client	Insurance	DOB	Phone	Phone Typ	Sex	Non-Admit Reason	Non-Admit Dat	Medic	Action
	Els, Ry		01/02/1987	(464) 356-4567	Home	Male	Other	10/19/2021	Yes	Admit
	Seev, Luna		03/18/1977	1548548546	Home	Male	Referral Refused Service	08/20/2021	Yes	Admit
2222222222	Smith, Nancy		02/05/1991	(444) 444-4444	Home	Female	Inappropriate For Home Care	07/15/2021	Yes	Admit
657967	Giggie, Higgie		03/25/1907	(857) 607-6576	Mobile	Male	Other	07/12/2021	Yes	Admit
ACT002	Jones, Mac	Test UB - 123456	10/06/1957	1234569999	Mobile	Male	Out of Service Area	07/02/2021	Yes	Admit

**Hospitalization Logs** - Clients that have been transferred to the hospital by completing a Transfer OASIS are visible in this screen for tracking purposes.



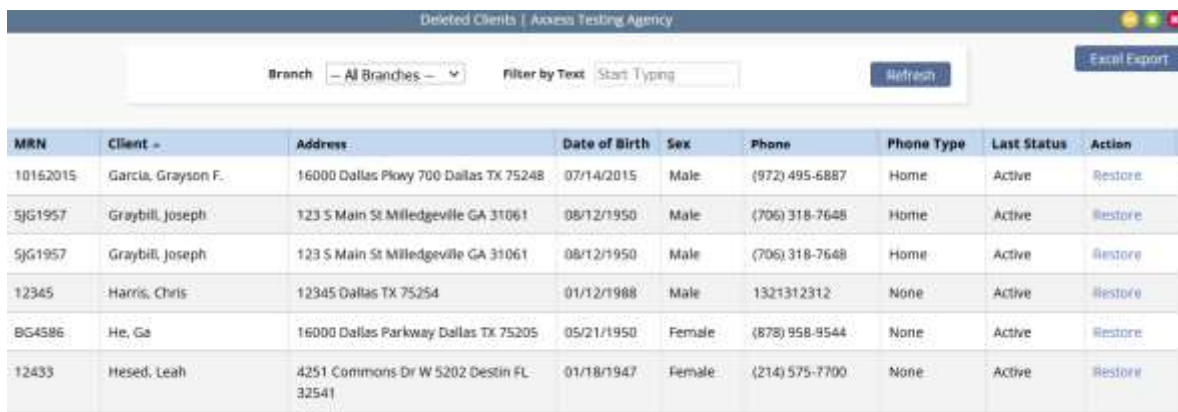
Hospitalization Logs | Axxess Testing Agency

Date Range: 09/01/2021 - 10/31/2021

Filter by Text: Start Typing

MRN	Client	Source	In Date	End Date	Status	Last Home Visit	User	Facility
GDS11192030	ABABA, JESS L.	User-Generated Transfer	10/12/2021	10/12/2021	Active	10/12/2021	Eric Stone K	Memoria
CM012521	BEHEL, ELAINE	OASIS Transfer Assessment	09/16/2021	10/01/2021	Active		Courtney McLeod	Memoria

**Deleted Clients** - Clients that have been deleted from the system are visible in this screen and are able to be restored, if necessary.



Deleted Clients | Axxess Testing Agency

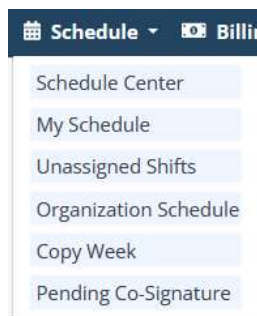
Branch: All Branches

Filter by Text: Start Typing

MRN	Client *	Address	Date of Birth	Sex	Phone	Phone Type	Last Status	Action
10162015	Garcia, Grayson F.	16000 Dallas Pkwy 700 Dallas TX 75248	07/14/2015	Male	(972) 495-6887	Home	Active	Restore
SJG1957	Graybill, Joseph	123 S Main St Milledgeville GA 31061	08/12/1950	Male	(706) 318-7648	Home	Active	Restore
SJG1957	Graybill, Joseph	123 S Main St Milledgeville GA 31061	08/12/1950	Male	(706) 318-7648	Home	Active	Restore
12345	Harris, Chris	12345 Dallas TX 75254	01/12/1988	Male	1321312312	None	Active	Restore
BG4586	He, Ga	16000 Dallas Parkway Dallas TX 75205	05/21/1950	Female	(878) 958-9544	None	Active	Restore
12433	Hesed, Leah	4251 Commons Dr W 5202 Destin FL 32541	01/18/1947	Female	(214) 575-7700	None	Active	Restore

**Schedule**

The **Schedule** menu enables access to the following actions based on permissions granted to the user. **NOTE: See Intake/Scheduling manual for further details.**



Schedule Center
My Schedule
Unassigned Shifts
Organization Schedule
Copy Week
Pending Co-Signature

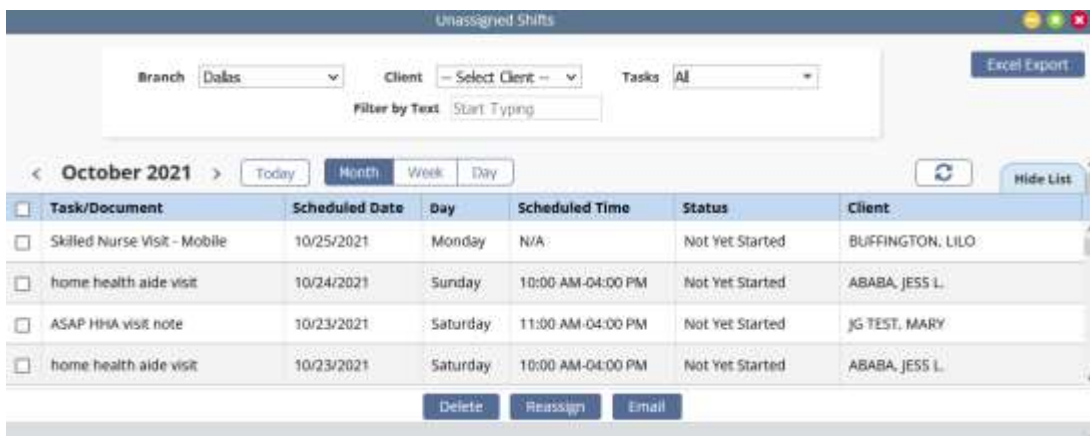
**Schedule Center** - Client-specific schedule is accessible from this screen which also enables a user to add additional visits to the schedule.



The screenshot shows the 'Schedule Center' for 'Access Testing Agency'. The client is 'ABABA, JESS L (GDS11192030) - Female'. The calendar view is for 'October 2021'. Tasks are color-coded: red for MSW Evaluation, blue for Life Skills 2, green for Skilled Nursing Visits, and yellow for Custom Care Plans. A sidebar on the left lists other clients like ABEL, ANTY, and ABRAMS.

**My Schedule** - View the user's schedule/tasks in a calendar or list view just like under the **Home** tab.

**Unassigned Shifts** - Central location to identify upcoming shifts that have not been assigned to a worker.



The screenshot shows the 'Unassigned Shifts' window. It includes filters for Branch (Dallas), Client (Select Client), and Tasks (All). A table lists unassigned tasks:

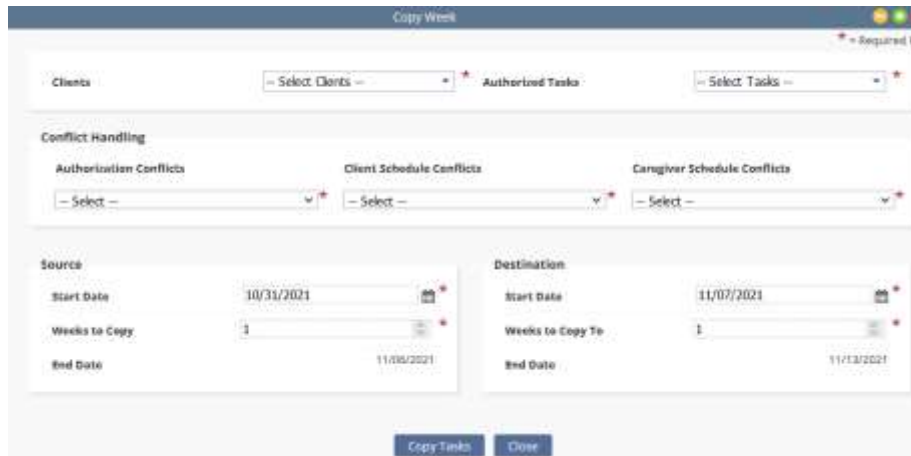
Task/Document	Scheduled Date	Day	Scheduled Time	Status	Client
Skilled Nurse Visit - Mobile	10/25/2021	Monday	N/A	Not Yet Started	BUFFINGTON, LILO
home health aide visit	10/24/2021	Sunday	10:00 AM-04:00 PM	Not Yet Started	ABABA, JESS L.
ASAP HHA visit note	10/23/2021	Saturday	11:00 AM-04:00 PM	Not Yet Started	JG TEST, MARY
home health aide visit	10/23/2021	Saturday	10:00 AM-04:00 PM	Not Yet Started	ABABA, JESS L.

Buttons for 'Delete', 'Reassign', and 'Email' are located at the bottom of the list.

**Organization Schedule** - Overview of all visits occurring throughout the organization for a given date.



**Copy Week** - Enables users to copy a scheduled week of visits for a client.



**Pending Co-Signature** - Notes that require a Co-Signature will be listed in this section until signed by the responsible co-signer.

Pending RN Co-Signature | Axxess Testing Agency

Branch: Dallas | Date Range: 10/18/2021 - 11/01/2021 | Refresh

Filter by Text: Start Typing

Visit Start Time	Client	Type	Clinician	Sign Date
10/19/2021	ARTHUR, SHELBA	RN Continuous Flowchart	Krystal Pana RN	10/19/2021
10/20/2021	CAZORLA, SANTI	PT Discharge	Kunle Oduloye RN	10/20/2021
10/21/2021	PRDD, DANE	Custom Visit - Mobile	Dane Ruccio RN	10/26/2021
10/21/2021	PRDD, DANE	Custom Visit - Mobile	Dane Ruccio RN	10/21/2021
10/22/2021	ARTHUR, SHELBA	Communication Note	Krystal Pana RN	10/22/2021

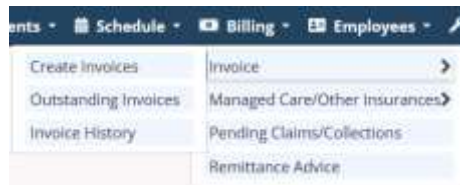
Total: 9

## Billing

The **Billing** menu allows access to the following actions based on permissions granted to the user. **NOTE: See Billing manual for further details.**



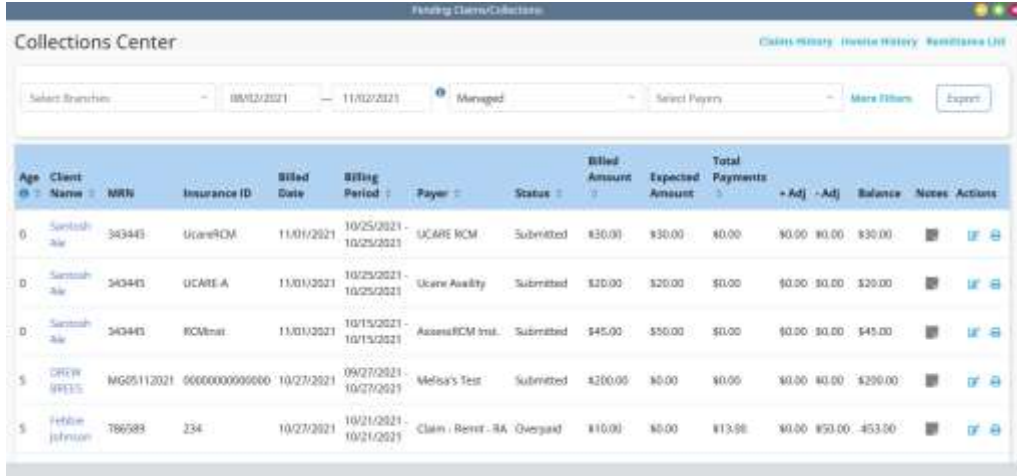
**Invoice** - Enables a user to create invoices, review outstanding invoices and invoice history for clients on private pay.



**Managed Care/Other Insurances** - This menu provides a user access to create claims for managed care/other insurances as well as review outstanding claims, claims history and claim submission history.

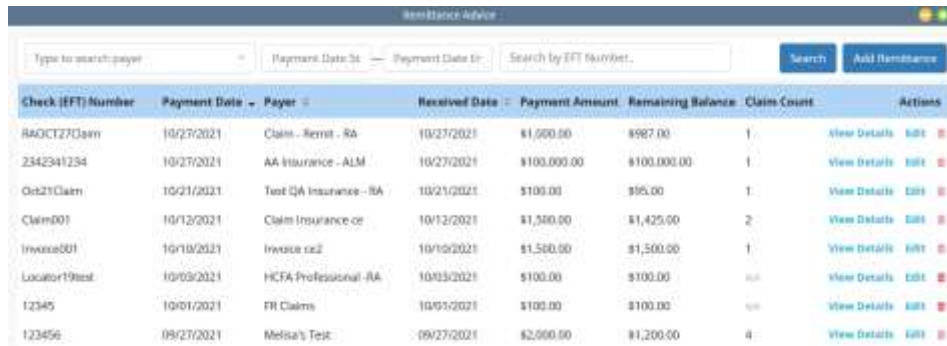


**Pending Claims/Collections** - This menu enables users to manage all claims and invoices with outstanding balances in a central location.



The screenshot shows the 'Collections Center' interface. It includes a search bar for 'Select Branches' with date filters for 08/02/2021 and 11/02/2021, and a 'Managed' status filter. Below the search bar is a table with columns: Age, Client Name, MRN, Insurance ID, Billed Date, Billing Period, Payer, Status, Billed Amount, Expected Amount, Total Payments, + Adj, - Adj, Balance, Notes, and Actions. The table contains five rows of data representing different claims.

**Remittance Advice** - This menu enables users to view remittance advice and add checks.



The screenshot shows the 'Remittance Advice' interface. It features a search bar for 'Type to search: payer', 'Payment Date To', 'Payment Date Fr', and 'Search by EFT Number'. There are 'Search' and 'Add Remittance' buttons. Below is a table with columns: Check (EFT) Number, Payment Date, Payer, Received Date, Payment Amount, Remaining Balance, Claim Count, and Actions. The table lists several remittance advice entries.

## Employees

The **Employees** menu enables access to the following actions based on permissions granted to the user.



The screenshot shows a dropdown menu for 'Employees'. The menu items are: Employee Center, New User, Payroll, and License Manager.

**Employee Center** - Employee records and access permissions are managed from this screen.



Employee Center | Axxess Testing Agency

Branch: -- All Branches -- | Schedule | Documents

Status: Active | Type: All

Find: [ Search ]

**Cristhel Abas RN** (Female - ID: [ ID ]) [ Change Photo ] [ Edit ] [ Status Log(s) ]

Address: 014 Sambaliko St. Lantona, Davao City, AL 11111

Primary Phone: [ Phone ] | Secondary Phone: 0072222222 | Email: cabas@axxess.com

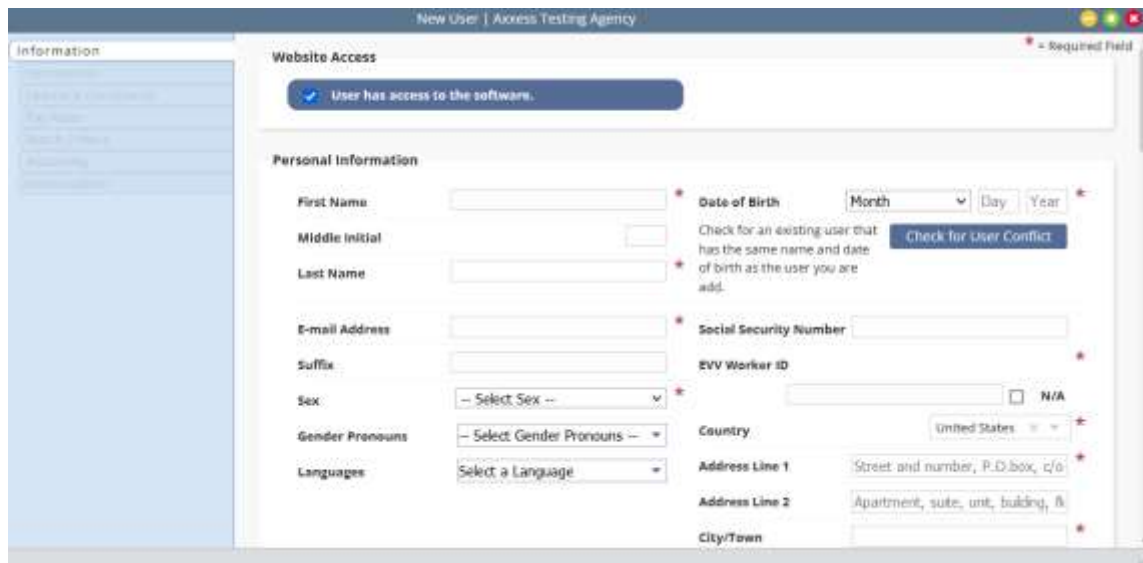
Quick Links: Permissions, Matching, Availability, Licenses, Infectious Disease, Profile, Immunization Profile, Personnel Note

Group by: None | Date: Current Pay Per | 10/24/2021-11/06/2021

Search for tasks that have been finalized within specific pay periods or date ranges. Unpaid items are shown regardless.

Task	Visit Date	Time In - Out	Client	Status	Payable	Paid
HHA Care Plan	10/27/2020	N/A	ABAS, PATIENT	Completed	✓	✗
Non-OASIS Start of Care	10/27/2020	01:30 AM-02:30 AM	ABAS, PATIENT	Completed (Export Ready)	✓	✗
PTO	11/09/2020	12:30 AM-01:30 AM	N/A	Not Yet Started	✓	✗

**New User** – A direct link to be able to add a new user.



New User | Axxess Testing Agency

Information

Website Access:  User has access to the software.

Personal Information

First Name: [ Field ] \* | Middle Initial: [ Field ] | Last Name: [ Field ] \*

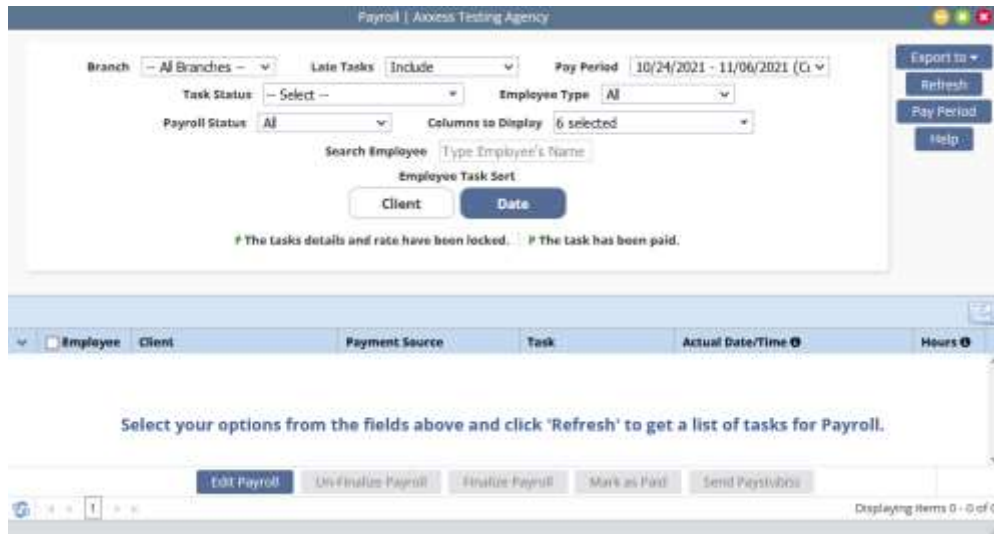
E-mail Address: [ Field ] \* | Suffix: [ Field ] | Sex: -- Select Sex -- \* | Gender Pronouns: -- Select Gender Pronouns -- | Languages: Select a Language

Date of Birth: Month [ Dropdown ] Day [ Field ] Year [ Field ] \* | Social Security Number: [ Field ] \* | EVV Worker ID: [ Field ] [ N/A ] \* | Country: United States \* | Address Line 1: Street and number, P.O. box, c/o \* | Address Line 2: Apartment, suite, unit, building, fl. \* | City/Town: [ Field ] \*

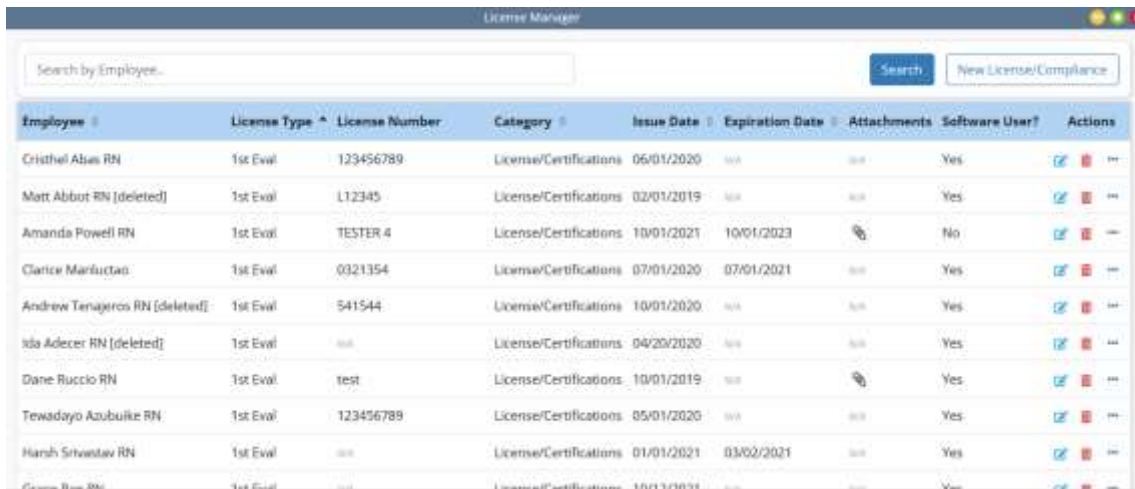
Check for an existing user that has the same name and date of birth as the user you are add. [ Check for User Conflict ]



**Payroll** - Reports for payroll purposes can be run from this screen.



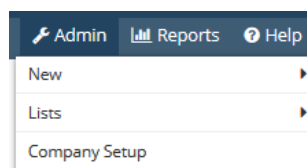
**License Manager** - Administration of employee licenses are handled from this screen, enabling quick identification of an expiring license.



Employee	License Type	License Number	Category	Issue Date	Expiration Date	Attachments	Software User?	Actions
Cristhel Abas RN	1st Eval	123456789	License/Certifications	06/01/2020			Yes	
Matt Abbot RN [deleted]	1st Eval	L12345	License/Certifications	02/01/2019			Yes	
Amanda Powell RN	1st Eval	TESTER 4	License/Certifications	10/01/2021	10/01/2023		No	
Clarice Manfactas	1st Eval	0321354	License/Certifications	07/01/2020	07/01/2021		Yes	
Andrew Tenajeros RN [deleted]	1st Eval	541544	License/Certifications	10/01/2020			Yes	
Ida Adecer RN [deleted]	1st Eval		License/Certifications	04/20/2020			Yes	
Dane Ruccio RN	1st Eval	test	License/Certifications	10/01/2019			Yes	
Tewardayo Azubulike RN	1st Eval	123456789	License/Certifications	05/01/2020			Yes	
Hansh Srivastav RN	1st Eval		License/Certifications	01/01/2021	03/02/2021		Yes	
Gracie Rose RN	1st Eval		License/Certifications	10/13/2021			Yes	

### Admin

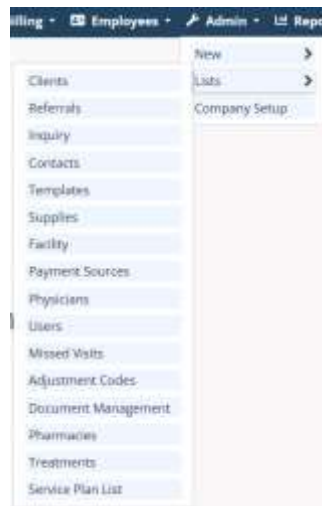
The **Admin** menu enables access to the following actions based on permissions granted to the user. **NOTE: See Admin manual for further details.**



**New** - Add new items in the system, such as a Referral, Facility, Pharmacy, etc.



**Lists** - View items in the system, such as a list of Referrals, Clients, Physicians, Payment Sources, etc.



**Company Setup** - Company-wide settings and information are managed from this screen.

**NOTE:** An Administrator/DON (permission-based) signature is required to access this screen.

Company Setup | Access Testing Agency

**Company Information**

<b>Company Name *</b>	<b>Tax ID *</b>	<b>Tax ID Type</b>	<b>CAHPS Vendor</b>
Access Testing Agency	123456789	EIN (Employer Ide...	Delta Satisfactor...
<b>National Provider Number</b>	<b>Medicare Provider Number</b>	<b>Medicaid Provider Number</b>	<b>Unique Agency OASIS ID Code</b>
5834467890	MCARE01	200037790A	00000000

**Contact Person**

<b>First Name *</b>	<b>Last Name *</b>	<b>Email *</b>
Anthony	Oshetu	ramikar@axcess.com
<b>Primary Phone</b>		
Home	1	(878) 787-8287

[Add Alternate Number](#)

## Reports

The **Reports** menu enables access to the following actions based on permissions granted to the user.



**Report Center** - Provides access to reports available within the system.

Report Center

Client Reports	Billing/Financial Reports	Employee Reports
Care Period Ending	Bill History	Employee Birthday Listing
Census by Date Range	Claims Detail	Employee Compliance
Client Admission	Unbilled Managed Care Claims	Employee Roster
Client Birthday Listing	Unbilled Visits for Managed Claims	Payroll Summary
Client by Physician	<b>MONTH-END CLOSE:</b>	<b>Annual Utilization Report (California)</b>
Client Discharge	Claim & Invoice Activity	Discharges By Reason
Client Mail	Month-End AR Report	<b>Electronic Visit Verification Reports</b>
Client Roster	Payment/Adjustment Activity	EDI Export Report (HHAExchange)
Durable Medical Equipment	<b>Schedule Reports</b>	<b>Survey Reports</b>
Emergency Preparedness	Authorizations Due	COVID-19 Vaccinations Report
Physician License Expiration	Authorizations Utilization	Infectious Disease Screening Report
Referral Tracking	Client Calendar	
	Clients with no Future Tasks Scheduled	
	Cost Report	
	Electronic Visit Verification Log	
	Employee Calendar	
	Missed Visits	
	Schedule Deviation	
	Schedule Summary	
	Task by Status	

**Completed Reports** - Some reports will be queued until compiled. Once the data has been compiled, the report will be available from this section.



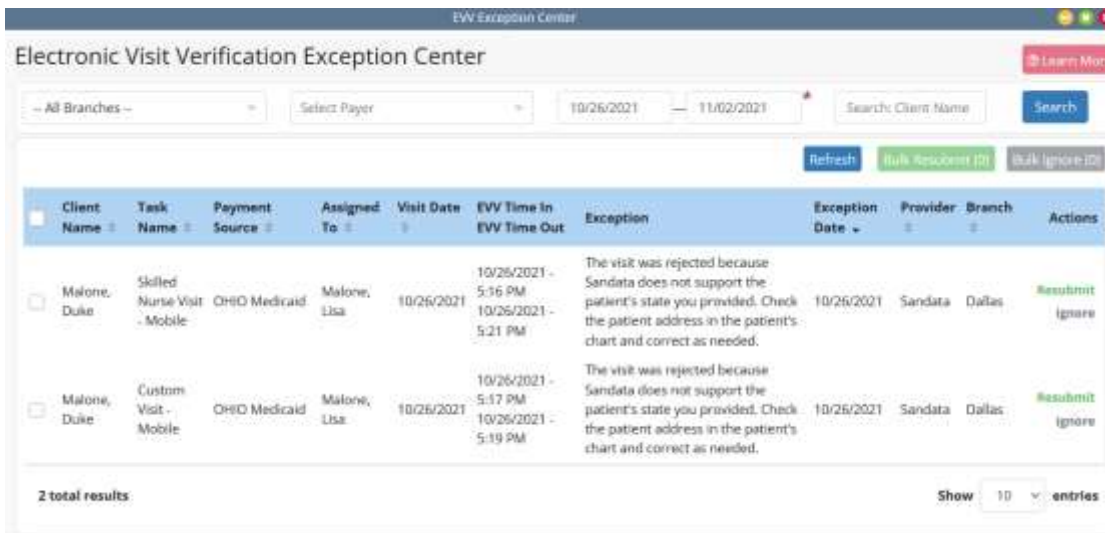
Completed Reports | Axxess Testing Agency

Filter by Text: Start Typing Refresh

<input type="checkbox"/>	Name	Format	Status	Requested By	Started	Completed	Action
<input type="checkbox"/>	Schedule Summary	Excel	Completed	Cj Pierson RN	11/2/2021 09:27:14 AM	11/2/2021 09:27:15 AM	Delete
<input type="checkbox"/>	Schedule Summary	Excel	Completed	Cj Pierson RN	7/27/2020 10:28:59 AM	7/27/2020 10:28:59 AM	Delete

Displaying items 1 - 2 of 2 Delete

**EVV Exception Center** - Enables users to manage, correct and resubmit EVV data when EVV exceptions occur.



Electronic Visit Verification Exception Center Learn More

-- All Branches -- Select Payer 10/26/2021 - 11/02/2021 Search Client Name Search

Refresh Bulk Resubmit (0) Bulk Ignore (0)

<input type="checkbox"/>	Client Name	Task Name	Payment Source	Assigned To	Visit Date	EVV Time In	EVV Time Out	Exception	Exception Date	Provider	Branch	Actions
<input type="checkbox"/>	Malone, Duke	Skilled Nurse Visit - Mobile	OHIO Medicaid	Malone, Lisa	10/26/2021	10/26/2021 - 5:16 PM	10/26/2021 - 5:21 PM	The visit was rejected because Sandata does not support the patient's state you provided. Check the patient address in the patient's chart and correct as needed.	10/26/2021	Sandata	Dallas	Resubmit Ignore
<input type="checkbox"/>	Malone, Duke	Custom Visit - Mobile	OHIO Medicaid	Malone, Lisa	10/26/2021	10/26/2021 - 5:17 PM	10/26/2021 - 5:19 PM	The visit was rejected because Sandata does not support the patient's state you provided. Check the patient address in the patient's chart and correct as needed.	10/26/2021	Sandata	Dallas	Resubmit Ignore

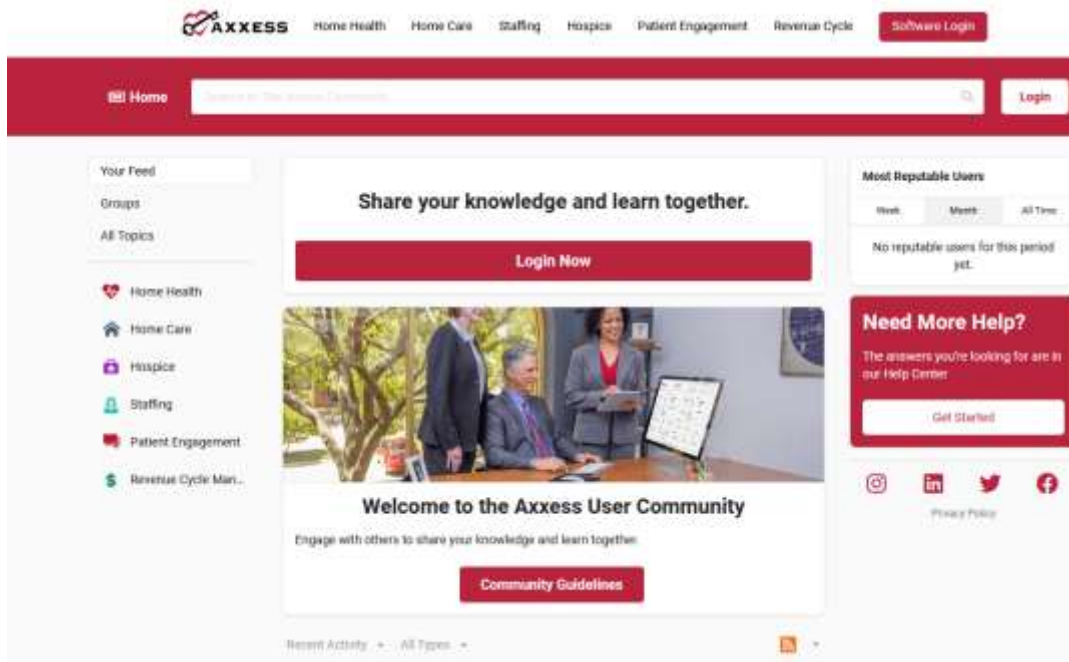
2 total results Show 10 entries

## Help

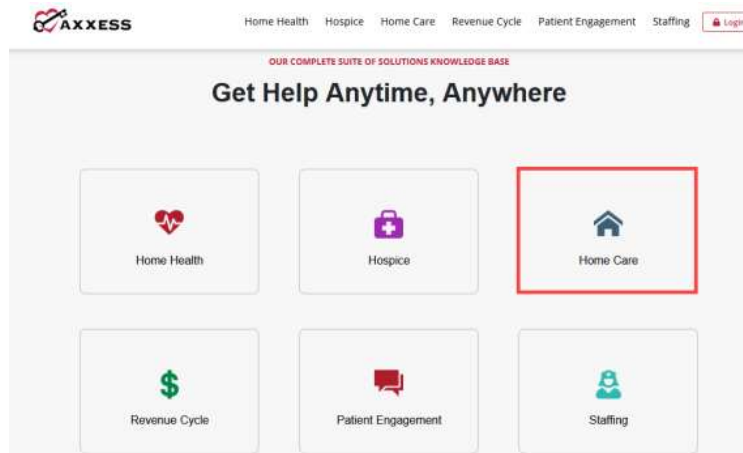
The **Help** menu enables access to the following actions based on permissions granted to the user.

- Help** ▾
- User Community
- Help Center
- On-Demand Training
- Recent Software Updates
- Submit a Ticket
- COVID-19 Resource Center
- Follow Axxess >

**User Community** - Direct link to the user community for users to connect, share, learn and grow together.

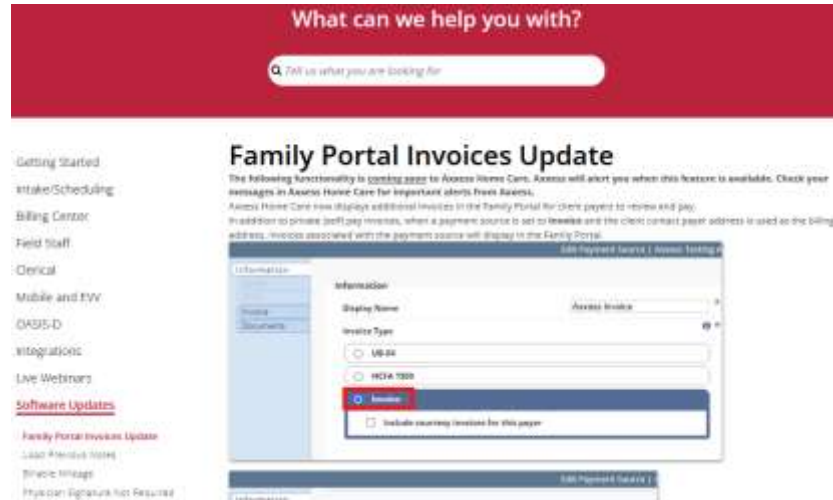


**Help Center** – A direct link to the Help Center that has answers, articles and videos related to Home Care content.



**On-Demand Training** - A direct link to a host of different Axxess Home Care Live Webinars.

**Recent Software Updates** - Identifies recent updates made to the software, including bug fixes and new features.



**Submit a Ticket** - Direct link to submit a support ticket for a current issue.

**COVID-19 Resource Center** - A direct link to the Axxess COVID-19 Resource Center which includes Best Practices, Hear from Experts, Helpful Downloads, Personal Protective Equipment (PPE) and Helpful Links. The page can also be found by going to [www.axxess.com/covid-19](http://www.axxess.com/covid-19)

**Follow Axxess** - Connect with Axxess on social media including Facebook and LinkedIn using the quick links provided in this menu.

## **RESET SIGNATURE**

*Home/My Account/Reset Signature.*

A new window will display, as seen below. Select **Reset Signature** and a link will be sent to the email address associated with the account. Review the system generated email that was sent to the user's email address for a personalized link to reset the signature. Upon selecting the link, a screen will appear in the web browser prompting to verify the information and enter a new signature.



To change your Axxess signature, follow these steps.

**Step 1 - Verify your information below.**

Name

Email

**Step 2 - Enter a new signature.**

New Signature

After inputting a new signature, select **Change signature** and a prompt will display confirming the change was successful. Close the internet browser window and log back into Axxess to use the newly updated signature.

## **RESET LOGIN PASSWORD**

To reset the Axxess login password, follow one of the methods listed below.

### **Current Login Password is Unknown**

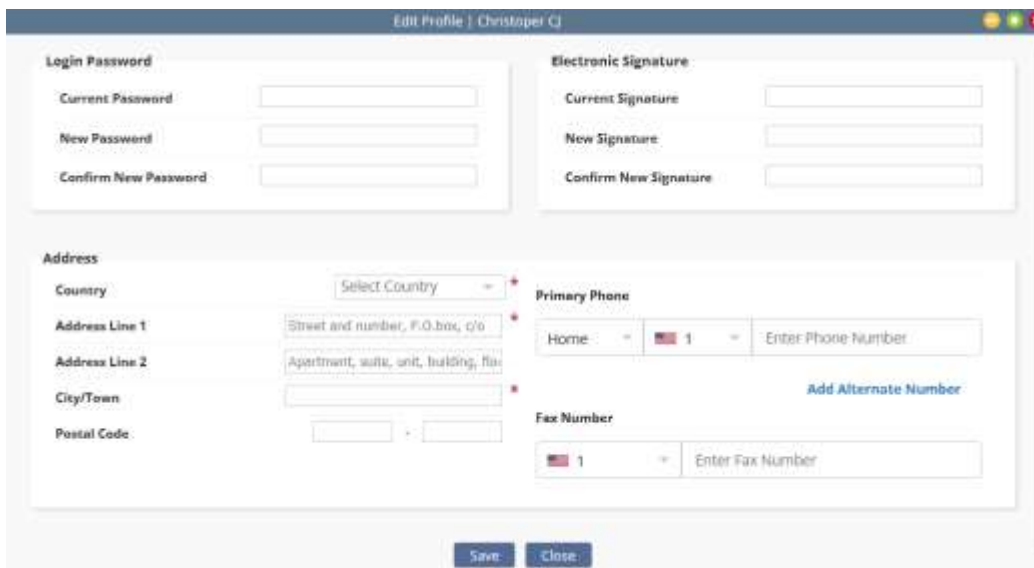
Navigate to the login page and select **Forgot your Password?** Continue to follow the prompts to enter the email address used to login to Axxess and select **Send**. This will send a password reset link to the user's email address.

  
  
  
 Remember Me [Forgot your Password?](#)  

## Current Login Password is Known

*Home/My Account/Edit Profile.*

On this screen, input the current password and new password desired in the boxes provided. Select **Save** to confirm the change.



**Edit Profile | Christopher Q**

**Login Password**

Current Password:

New Password:

Confirm New Password:

**Electronic Signature**

Current Signature:

New Signature:

Confirm New Signature:

**Address**

Country:

Address Line 1:

Address Line 2:

City/Town:

Postal Code:  -

**Primary Phone**

Home:  -

[Add Alternate Number](#)

**Fax Number**

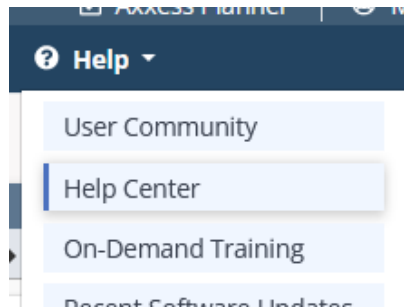
-



## 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/>

