

HOME CARE OVERVIEW TRAINING MANUAL

January 2022

Table of Contents

LOGIN TO AXXESS	3
AXXESS PLANNER.....	3
NAVIGATION MENU	4
Home	4
Create.....	6
View	14
Clients.....	16
Schedule.....	19
Billing	22
Employees.....	23
Admin	25
Reports.....	27
Help	28
RESET SIGNATURE	30
RESET LOGIN PASSWORD	31
Current Login Password is Unknown.....	31
Current Login Password is Known.....	32
HELP CENTER.....	33

LOGIN TO AXXESS

Navigate to www.axxess.com. Select the **LOGIN** button.

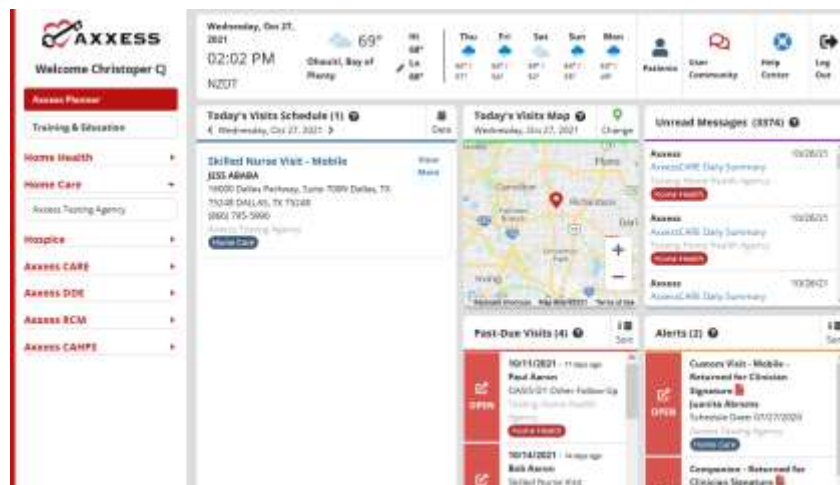


Input user credentials and select the **Secure Login** button.



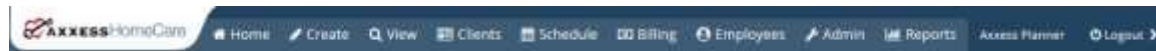
AXXESS PLANNER

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.



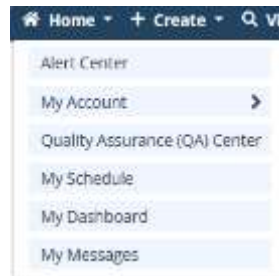
NAVIGATION MENU

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

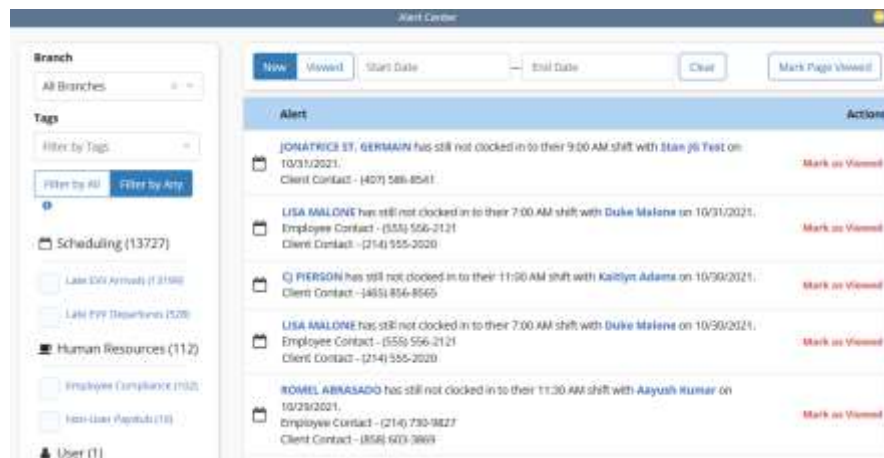


Home

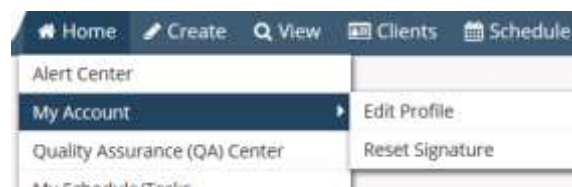
The Home menu allows access to the following actions based on permissions granted to the user.



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.



Quality Assurance (QA) Center - View tasks that are pending approval by the QA Nurse.

Quality Assurance (QA) Center | Access Testing Agency

Branch: Dallas Client Status: Select

Date Range: 10/08/2021 - 10/31/2021 Tag Type: Select

☐ Group by Client
 ☐ Group by Date
 ☐ Group by Task
 ☐ Group by Client/Date
 Start Typing

Client	Date	Task	Status	Assigned To
<input type="checkbox"/> JOHNSON, BEENA	10/08/2021	PAID Note - W & M RA	Submitted With Signature	Ramalak Access RH
<input type="checkbox"/> JOHNSON, FLOWER	10/08/2021	New Service Plan - RA	Submitted With Signature	Ramalak Access RH
<input type="checkbox"/> BONES, ELAINE	10/09/2021	SV Visit - Courtney	Submitted With Signature	Melisa Gonzalez RH

Cancel

My Schedule - View the schedule/tasks in a list view.

My Schedule | C J Pearson - 80

PIERSON, C J • Male

Event Report | Add Event | Add Task

October 2021 | Today | Next | Previous | Print

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Event Details:

- Tuesday, October 19, 10:00 AM - 12:00 PM: DASH AT Seat of Grace**
- Wednesday, October 20, 10:00 AM - 12:00 PM: HHA Visit**
- Wednesday, October 20, 12:00 PM - 2:00 PM: DASH AT Seat of Grace**
- Thursday, October 21, 10:00 AM - 12:00 PM: HHA Visit**
- Thursday, October 21, 12:00 PM - 2:00 PM: DASH AT Seat of Grace**
- Friday, October 22, 10:00 AM - 12:00 PM: DASH AT Seat of Grace**
- Saturday, October 23, 10:00 AM - 12:00 PM: DASH AT Seat of Grace**

My Dashboard - Opens the Home Care dashboard.

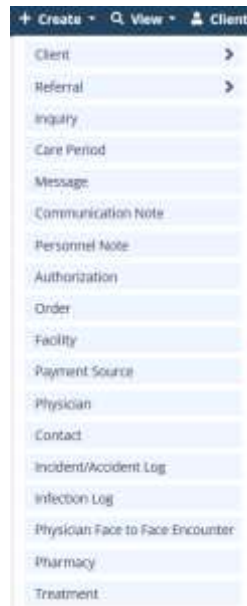
[illegible]

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

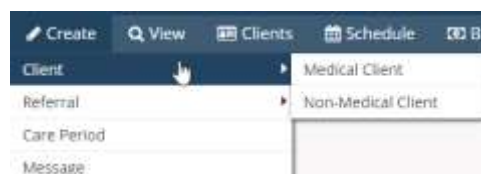


Create

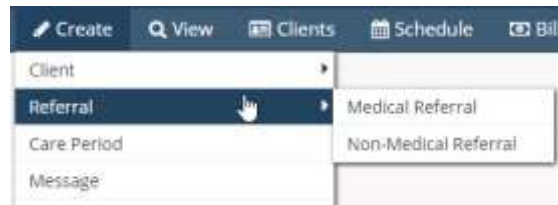
The **Create** menu allows access to the following actions based on permissions granted to the user.



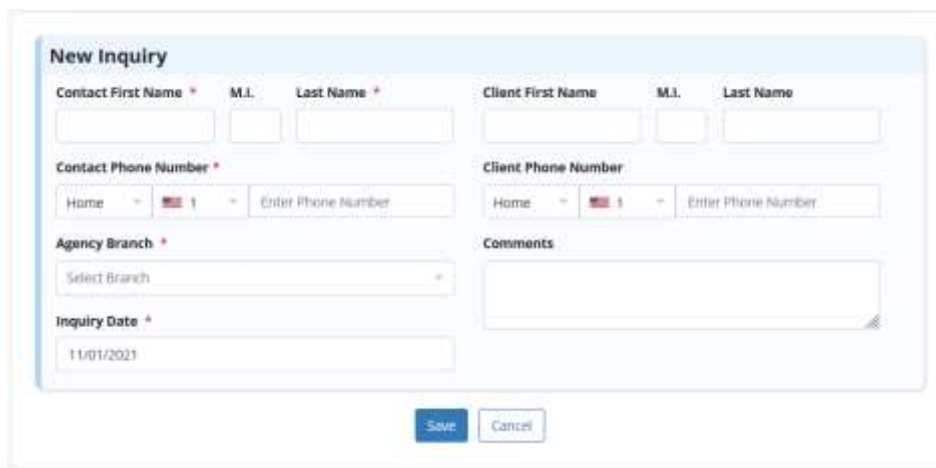
Client - Allows a user to create either a Medical or Non-Medical Client.



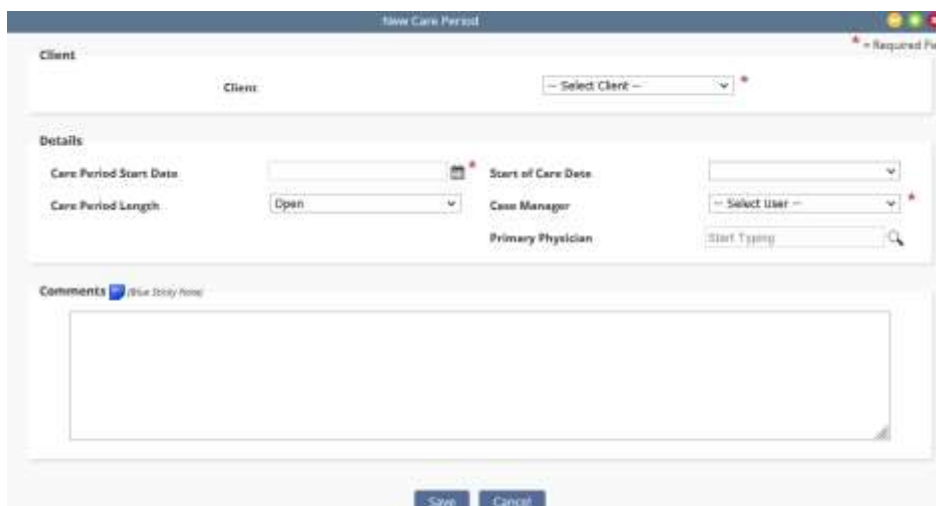
Referral - Create either a Medical or Non-Medical Referral.



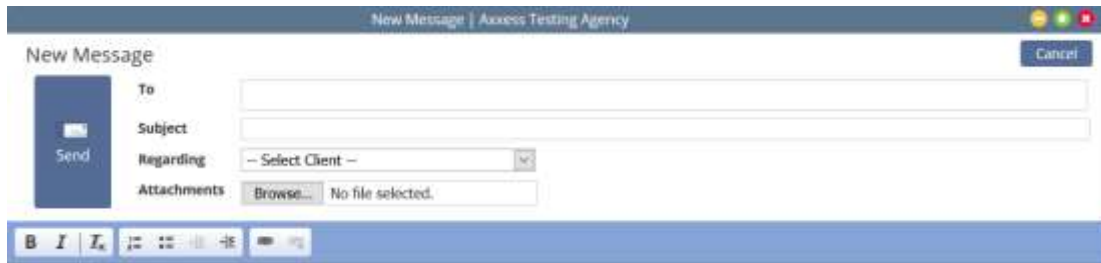
Inquiry - Opens a new window that allows a user to create a new inquiry for a potential client.



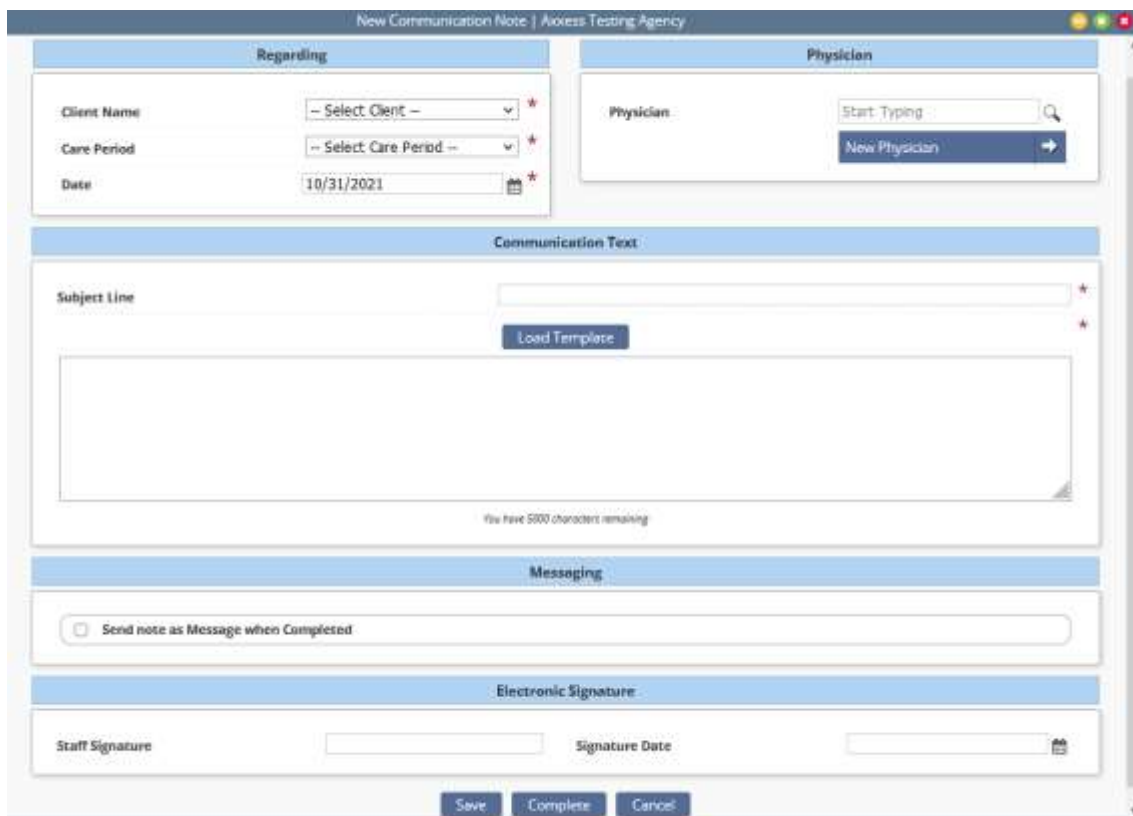
Care Period - Opens a new window that allows a user to create a care period for a client.



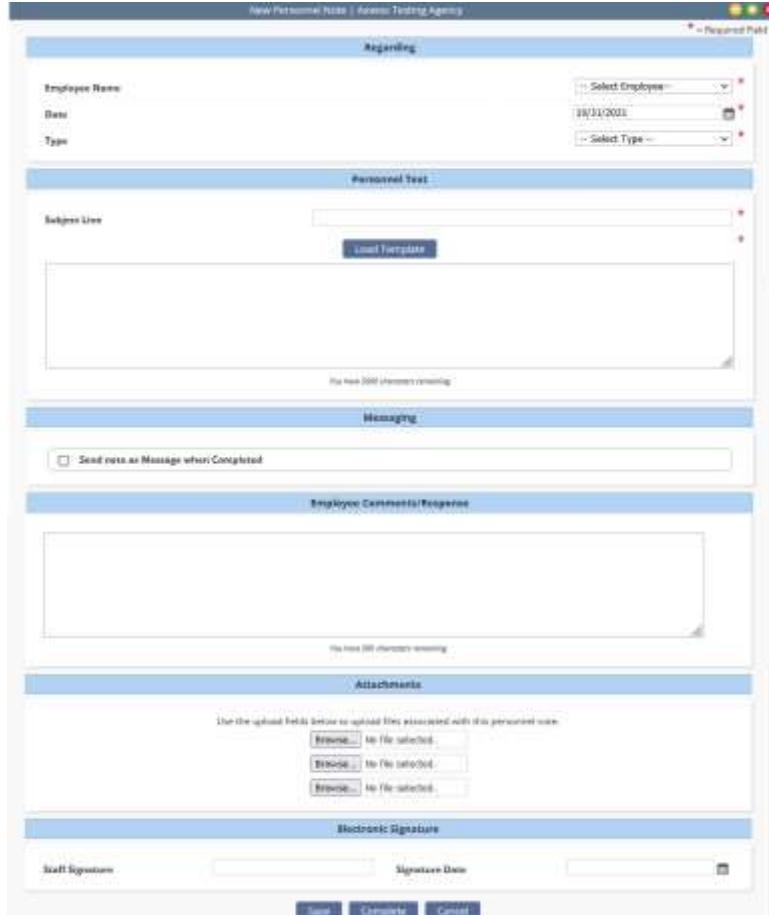
Message - Opens a blank message to compose to another user in the system.



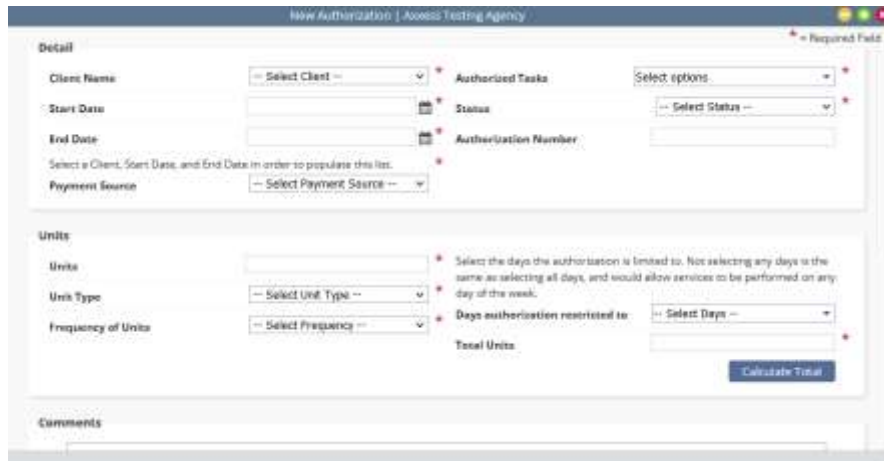
Communication Note - Creates a new communication note for a specific client/care period.



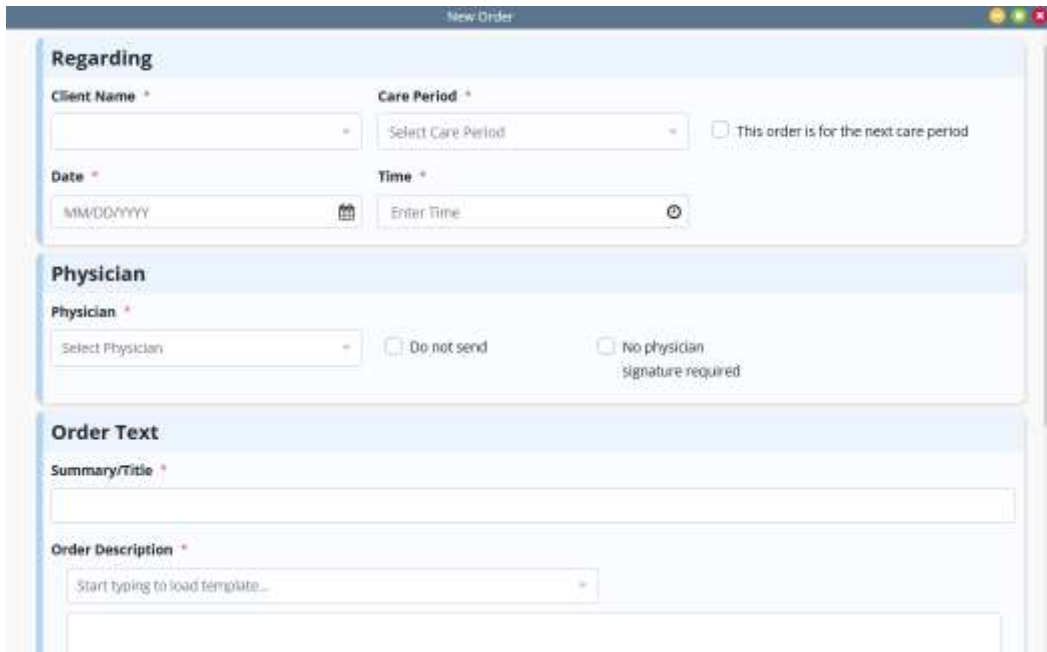
Personnel Note - The personnel note is permission-based and enables organizations to document employee communication



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



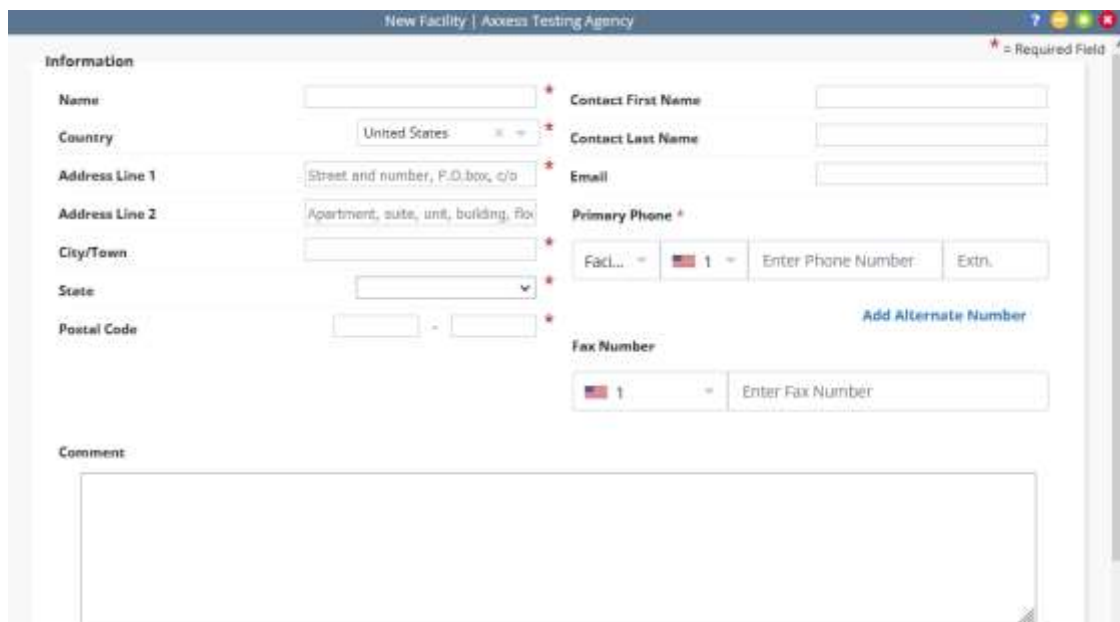
Order - Creates a new order for a specific client.



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

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

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

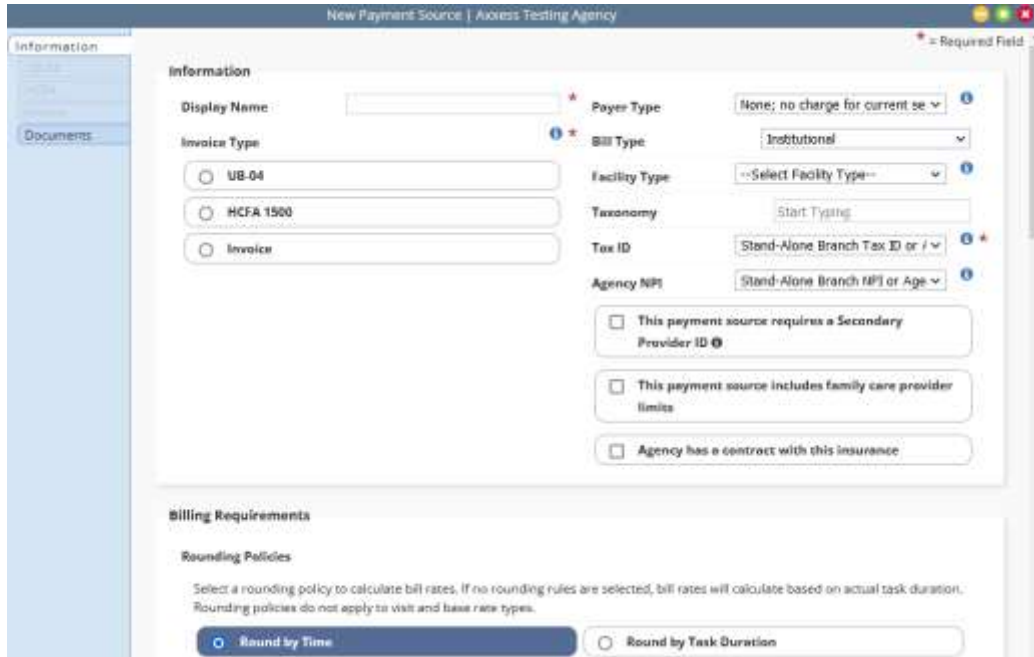


The 'New Facility' form is titled 'New Facility | Axxess Testing Agency' and includes a legend for required fields (marked with a red asterisk). The form is organized into two main columns:

- Information:** Contains fields for 'Name', 'Country' (dropdown, currently 'United States'), 'Address Line 1' (placeholder: 'Street and number, P.O. box, c/o'), 'Address Line 2' (placeholder: 'Apartment, suite, unit, building, floor'), 'City/Town', 'State' (dropdown), and 'Postal Code'.
- Contact Information:** Contains fields for 'Contact First Name', 'Contact Last Name', 'Email', 'Primary Phone' (with a dropdown for 'FacL...' and a '1' icon, followed by 'Enter Phone Number' and 'Extn.'), and 'Fax Number' (with a '1' icon and 'Enter Fax Number'). There is also a link '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 left sidebar has 'Information' and 'Documents' tabs. The main form is divided into two sections: 'Information' and 'Billing Requirements'.

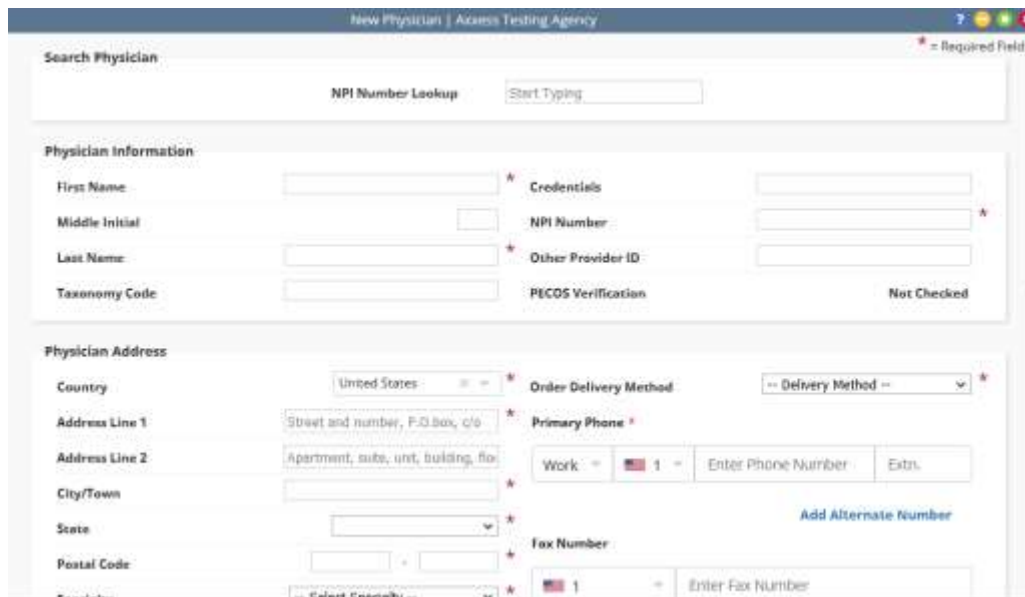
Information Section:

- Display Name:** Text input field.
- Invoice Type:** Radio buttons for 'UB-04', 'HCFA 1500', and 'Invoice'.
- Payer Type:** Dropdown menu with 'None; no charge for current se' selected.
- Bill Type:** Dropdown menu with 'Institutional' selected.
- Facility Type:** Dropdown menu with '--Select Facility Type--' selected.
- Taxonomy:** Text input field with 'Start Typing' placeholder.
- Tax ID:** Dropdown menu with 'Stand-Alone Branch Tax ID or /' selected.
- Agency NPI:** Dropdown menu with 'Stand-Alone Branch NPI or Age' selected.
- Checkboxes:**
 - ☐ This payment source requires a Secondary Provider ID
 - ☐ This payment source includes family care provider limits
 - ☐ Agency has a contract with this insurance

Billing Requirements Section:

- Rounding Policies:** Text explaining rounding policies.
- 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. The left sidebar has 'Search Physician' and 'NPI Number Lookup' tabs. The main form is divided into three sections: 'Physician Information', 'Physician Address', and 'Physician Contact Information'.

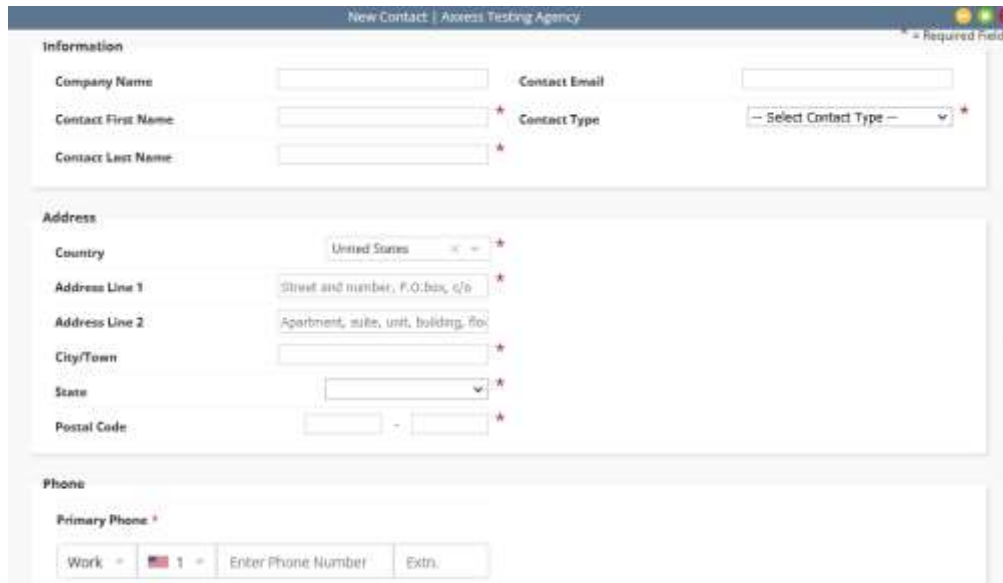
Physician Information Section:

- First Name:** Text input field.
- Middle Initial:** Text input field.
- Last Name:** Text input field.
- Taxonomy Code:** Text input field.
- Credentials:** Text input field.
- NPI Number:** Text input field.
- Other Provider ID:** Text input field.
- PECOS Verification:** Text input field with 'Not Checked' value.

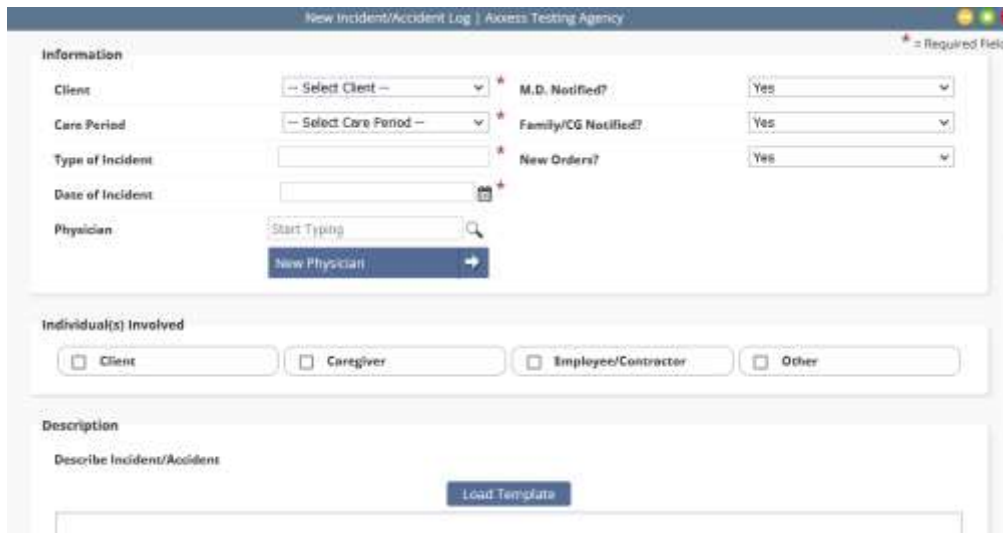
Physician Address Section:

- Country:** Dropdown menu with 'United States' selected.
- Address Line 1:** Text input field with placeholder 'Street and number, P.O. Box, c/o'.
- Address Line 2:** Text input field with placeholder 'Apartment, suite, unit, building, floor'.
- City/Town:** Text input field.
- State:** Dropdown menu.
- Postal Code:** Text input field.
- Country:** Text input field with placeholder '--Select Country--'.
- Order Delivery Method:** Dropdown menu with '-- Delivery Method --' selected.
- Primary Phone:** Text input field.
- Work:** Text input field with '1' in a box.
- Enter Phone Number:** Text input field.
- Extn.:** Text input field.
- Add Alternate Number:** Button.
- Fax Number:** Text input field.
- 1:** Text input field with '1' in a box.
- Enter Fax Number:** Text input field.

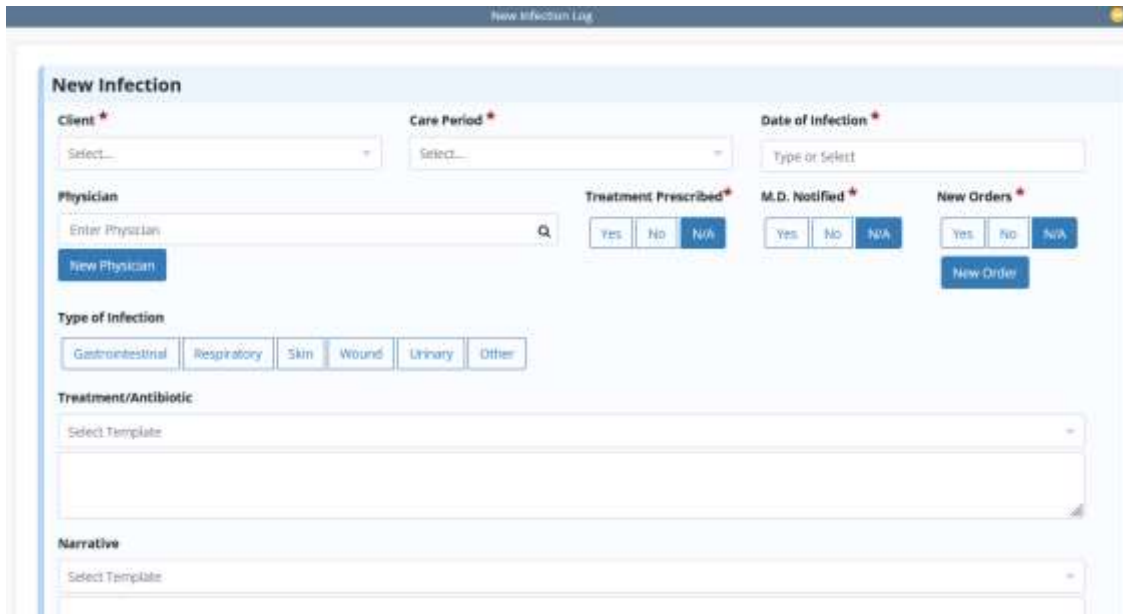
Contact - Creates a new contact within the Home Care system.



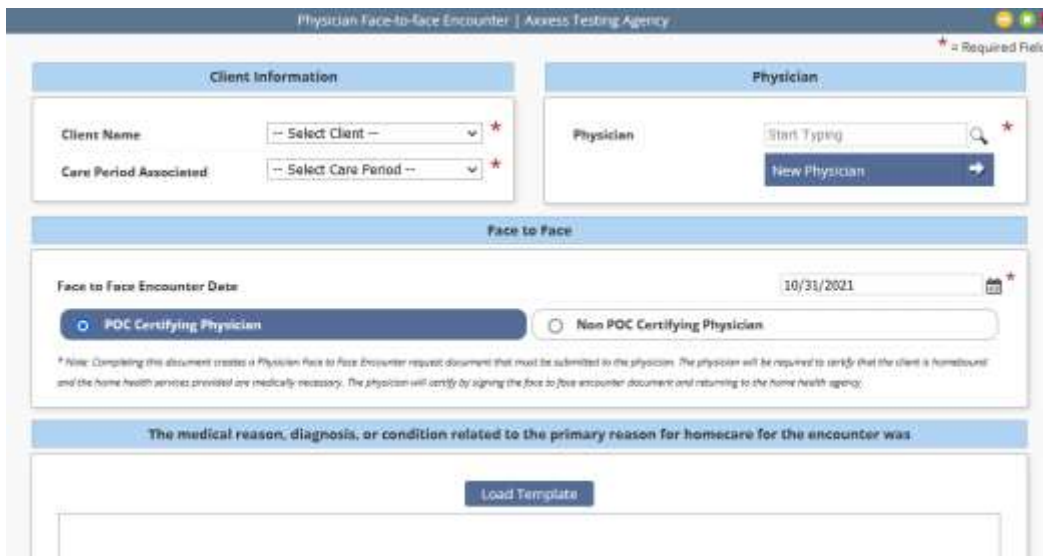
Incident/Accident Log - Creates a new incident/accident log specific to a client.



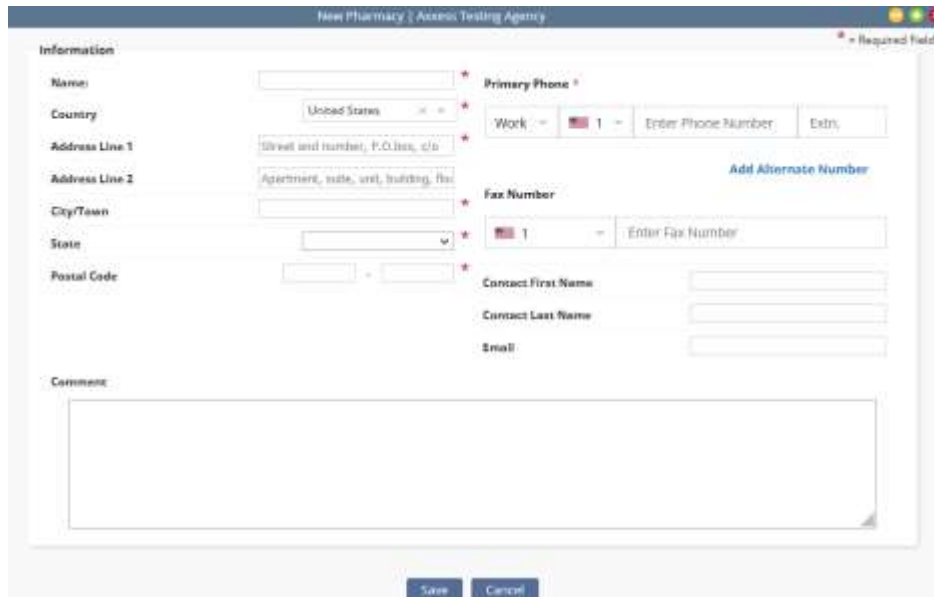
Infection Log - Creates an infection log record for a specific client.




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.

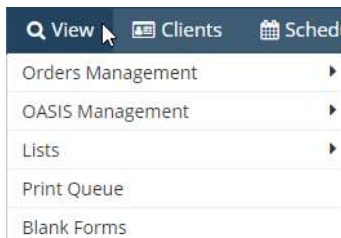


Treatment - Creates a new treatment within the Home Care system.

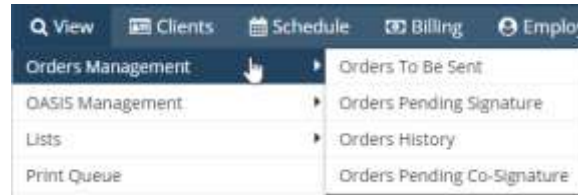


View

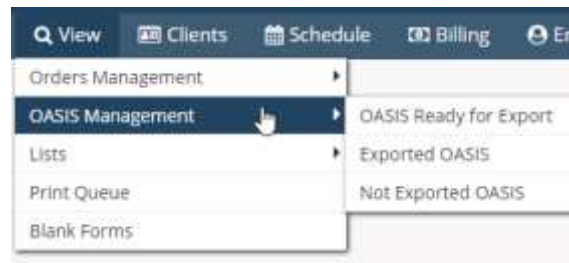
The **View** menu allows access to the following actions based on permissions granted to the user.



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.



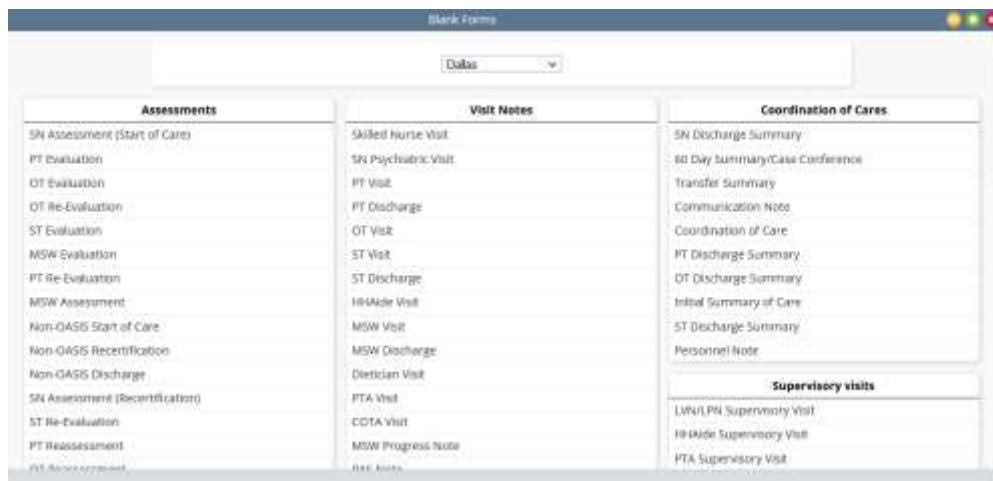
Print Queue - Displays tasks that are ready to be printed and delivered to the appropriate recipient.



The screenshot shows the 'Print Queue' window for 'Axxess Testing Agency'. It includes filters for Branch (Dallas), Date Range (10/24/2021 to 10/31/2021), and sorting options (Group by Client, Date, Task, or Employee). The table below lists the tasks:

Client	Date	Task	Status	Employee
<input type="checkbox"/> JOHNSON, FLOWER	10/28/2021	Physician Order	Submitted Pending Co-Signature	Ramaker Axxess RN
<input type="checkbox"/> JOHNSON, FLOWER	10/28/2021	Physician Order	Submitted Pending Co-Signature	Ramaker Axxess RN
<input type="checkbox"/> MALONE, DUKE	10/28/2021	Physician Order	Submitted Pending Co-Signature	Lisa Malone RN

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

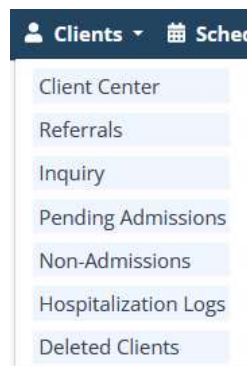


The screenshot shows the 'Blank Forms' window for 'Dallas'. It displays a list of forms organized into three columns: Assessments, Visit Notes, and Coordination of Cares. The forms include:

- Assessments:** SN Assessment (Start of Care), PT Evaluation, OT Evaluation, OT Re-Evaluation, ST Evaluation, MSW Evaluation, PT Re-Evaluation, MSW Assessment, Non-QASIS Start of Care, Non-QASIS Recertification, Non-QASIS Discharge, SN Assessment (Recertification), ST Re-Evaluation, PT Reassessment, PYS Reassessment.
- Visit Notes:** Skilled Nurse Visit, SN Psychiatric Visit, PT Visit, PT Discharge, OT Visit, ST Visit, ST Discharge, HH Aide Visit, MSW Visit, MSW Discharge, Dietician Visit, PTA Visit, COTA Visit, MSW Progress Note, RRE Exam.
- Coordination of Cares:** SN Discharge Summary, 60 Day Summary/Case Conference, Transfer Summary, Communication Note, Coordination of Care, PT Discharge Summary, OT Discharge Summary, Initial Summary of Care, ST Discharge Summary, Personnel Note.
- Supervisory visits:** LWN/LPN Supervisory Visit, HH Aide Supervisory Visit, PTA Supervisory Visit.

Clients

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



The screenshot shows the 'Clients' menu with the following options:

- Client Center
- Referrals
- Inquiry
- Pending Admissions
- Non-Admissions
- Hospitalization Logs
- Deleted Clients

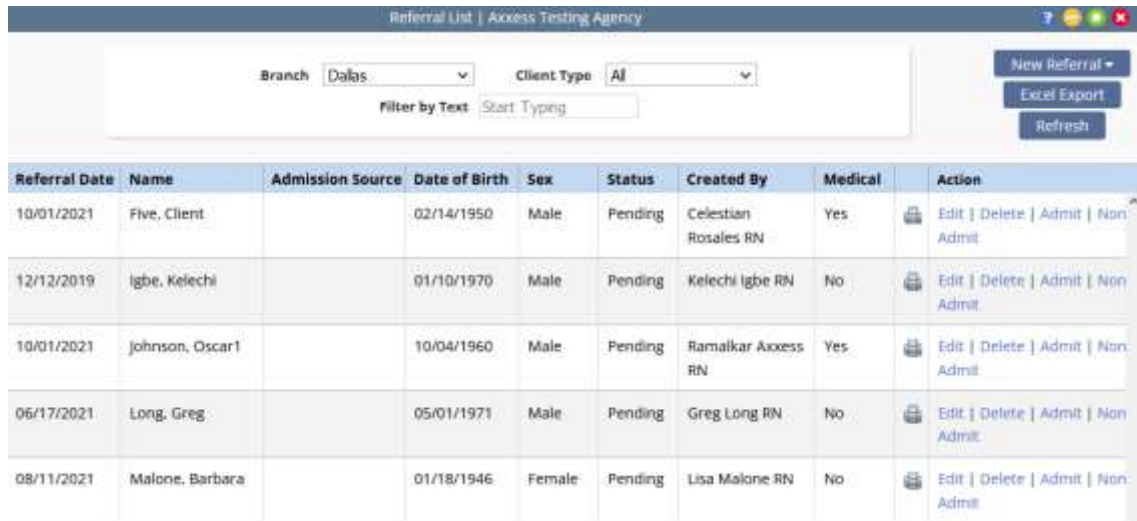
Client Center - View client charts within the system, including Active, Pending, Discharged, Non-Admitted and Hospitalized clients.



The screenshot shows the Client Center interface for a client named ABABA, JESS L. The interface includes a sidebar with filters for Branch, Status, Type, Payer, and Tags. The main area displays the client's profile, including a cartoon avatar, name, gender, age, MRN, physician, DOB, SOC, phone number, and phone type. Below the profile is a table of tasks with columns for Task, Date, Time In - Out, Assigned To, Status, and Action.

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

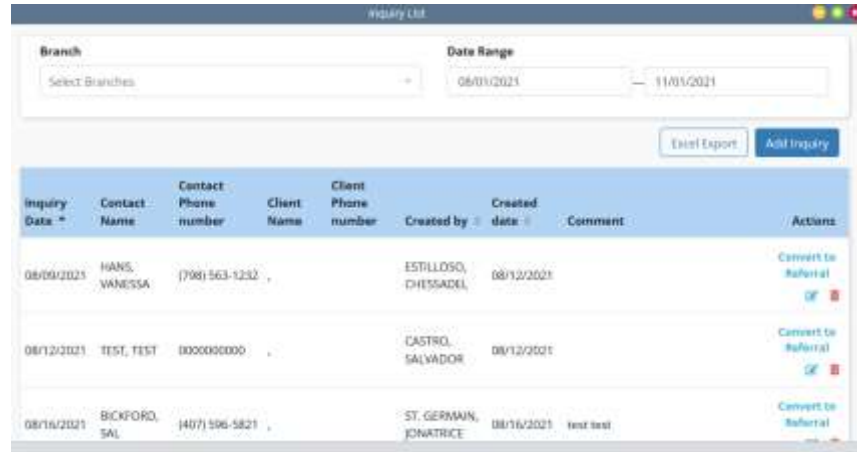
Referrals - View a list of pending referrals and begin the admission process.



The screenshot shows the Referral List interface. It includes filters for Branch (Dallas) and Client Type (All). Below the filters is a table of referrals with columns for Referral Date, Name, Admission Source, Date of Birth, Sex, Status, Created By, Medical, and Action.

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	[Icon] Edit Delete Admit Non Admit
12/12/2019	Igbe, Kelechi		01/10/1970	Male	Pending	Kelechi Igbe RN	No	[Icon] Edit Delete Admit Non Admit
10/01/2021	Johnson, Oscar I		10/04/1960	Male	Pending	Ramalkar Axxess RN	Yes	[Icon] Edit Delete Admit Non Admit
06/17/2021	Long, Greg		05/01/1971	Male	Pending	Greg Long RN	No	[Icon] Edit Delete Admit Non Admit
08/11/2021	Malone, Barbara		01/18/1946	Female	Pending	Lisa Malone RN	No	[Icon] Edit Delete Admit Non Admit

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



The screenshot shows the 'Inquiry List' window. At the top, there are filters for 'Branch' (a dropdown menu) and 'Date Range' (from 06/01/2021 to 11/01/2021). Below these are buttons for 'Excel Export' and 'Add Inquiry'. The main table has the following columns: Inquiry Date, Contact Name, Contact Phone number, Client Name, Client Phone number, Created by, Created date, Comment, and Actions. Three rows of data are visible:

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.



The screenshot shows the 'Pending Client Admissions' window for 'Access Testing Agency'. It includes filters for 'Branch' (Dallas) and 'Client Type' (All). There are buttons for 'New Client', 'Excel Export', and 'Refresh'. The table below lists pending clients with columns: MRN, Client, Referral Source, Sex, Medical, Branch, Req. SOC, Zip, and Action.

MRN	Client	Referral Source	Sex	Medical	Branch	Req. SOC	Zip	Action
N10132020	jason, annahq		Male	Yes	Dallas	10/13/2020	15784	Edit Admit Non-Admit
12345678	Almad, yashin		Female	Yes	Dallas	07/14/2021	75248	Edit Admit Non-Admit
AC10123021	Clement, Dume		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	idid, dtdydf		Female	Yes	Dallas	02/21/2018	75243	Edit Admit Non-Admit
852	Dou, jane		Female	Yes	Dallas	01/15/2019	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.



The screenshot shows the 'Non-Admitted Clients' window for 'Access Testing Agency'. It includes filters for 'Branch' (Dallas) and a 'Filter by Text' field. There are buttons for 'New Client', 'Excel Export', and 'Refresh'. The table below lists non-admitted clients with columns: MRN, Client, Insurance, DOB, Phone, Phone Type, Sex, Non-Admit Reason, Non-Admit Date, Medic, and Action.

MRN	Client	Insurance	DOB	Phone	Phone Type	Sex	Non-Admit Reason	Non-Admit Date	Medic	Action
	Etc. 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	09/20/2021	Yes	Admit
2222222222	Smith, Nancy		02/05/1997	(444) 444-4444	Home	Female	Inappropriate For Home Care	07/15/2021	Yes	Admit
657967	Griffie, Hgfhg		03/25/1907	(857) 607-6576	Mobile	Male	Other	07/12/2021	Yes	Admit
ACT002	Jones, Mac	Test UB - 123456	10/06/1997	1234569999	Mobile	Male	Out of Service Area	07/02/2021	Yes	Admit

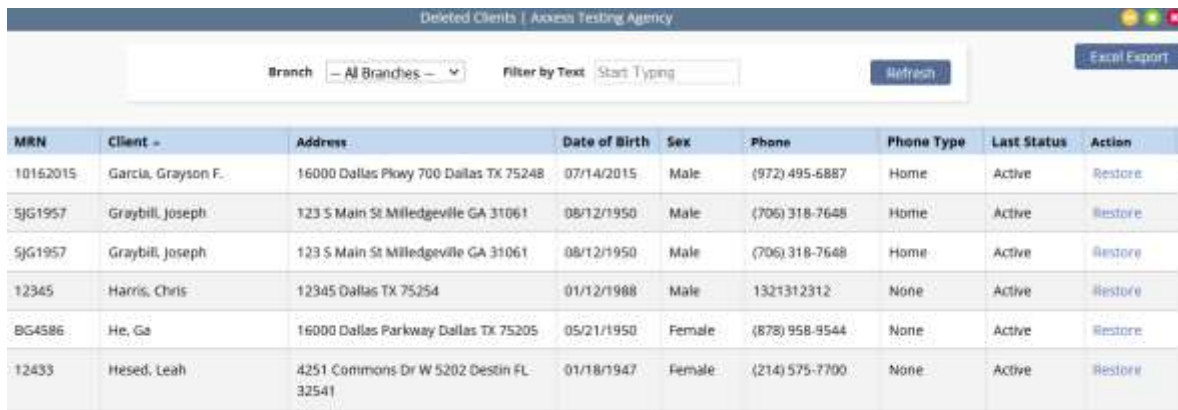
Hospitalization Logs - Clients that have been transferred to the hospital by completing a Transfer OASIS are visible in this screen for tracking purposes.



The screenshot shows the 'Hospitalization Logs' interface for 'Axxess Testing Agency'. It includes a date range filter set to 09/01/2021 to 10/31/2021, a 'Filter by Text' search bar, and buttons for 'Refresh' and 'Excel Export'. The table below lists hospitalization records.

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	BENES, 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.

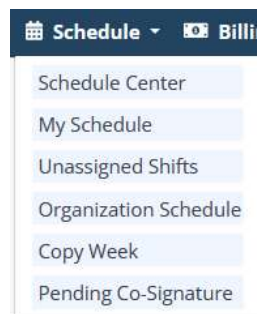


The screenshot shows the 'Deleted Clients' interface for 'Axxess Testing Agency'. It includes a 'Branch' dropdown set to 'All Branches', a 'Filter by Text' search bar, and buttons for 'Refresh' and 'Excel Export'. The table below lists deleted client records.

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



Schedule Center | Axxess Testing Agency

Client: **ABABA, JESS L (GDS11192030)** • Female
 16500 Dallas Parkway Nw, Dallas, TX • (866) 795-5990 • 03/12/1980

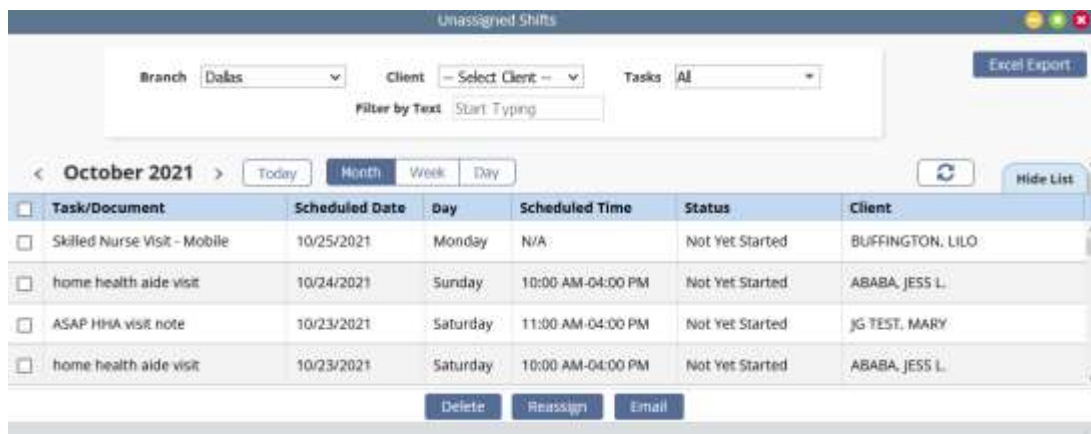
Care Period(s): 09/20/2021 to Open

October 2021

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	10:00AM - 2:00PM MSW Evaluation Wendy Anderson RN (866) 795-5990	Custom Visit - Mobile Shawna Latta RN	2:00PM - 3:00PM Infusion Initial Shawna Latta RN	Life Skills 2 Allyson Rato RN 9:00AM - 1:00PM Continuous Care Fl Eric Stone RN	6:00AM - 7:00PM Infusion Initial Reymont Cases RN	1:00AM - 2:00PM Skilled nurse visit Allyson Rato RN
Life Skills 2 Reymont Cases RN	Skilled Nursing Visit Eric Stone RN	Continuous Care Fl Allyson Rato RN	Life Skills 2 Allyson Rato RN	12:00AM - 12:01AM Skilled Nurse Visit Shawna Latta RN	Physician order Allyson Rato RN (866) 795-5990	Physician order Allyson Rato RN (866) 795-5990
12:00AM - 1:00AM Admission HHA Note Allyson Rato RN	8:00AM - 7:00AM Infusion Initial Reymont Cases RN	12:15AM - 1:15AM MSW Evaluation Jan Rodriguez	Skilled Nursing Visit Cindy Howard RN	6:00AM - 7:00AM Infusion Initial Reymont Cases RN	Physician order Allyson Rato RN (866) 795-5990	12:00AM - 12:01AM 24 hour visit note Reymont Cases RN (866) 795-5990
			6:00AM - 7:00AM Infusion Initial Reymont Cases RN			
Physician order Allyson Rato RN (866) 795-5990	Kim PT Re-Eval Allyson Rato RN	12:00AM - 2:15AM SDC Visit Allyson Rato RN	Custom Care Plan Allyson Rato RN (866) 795-5990	Skilled Nursing Visit Eric Stone RN	Pediatric SN Note Reymont Cases RN	
12:00AM - 12:01AM AH HHA Note Allyson Rato RN (866) 795-5990	Skilled Nursing Visit Eric Stone RN	HHA Care Plan Cindy Howard RN	12:00AM - 12:01AM Skilled Nursing Visit Allyson Rato RN	HHA Care Plan Allyson Rato RN (866) 795-5990	12:00AM - 1:00AM Custom Care Note Allyson Rato RN (866) 795-5990	

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.



Unassigned Shifts

Branch: Dallas Client: Select Client Tasks: All

Filter by Text: Start Typing

October 2021

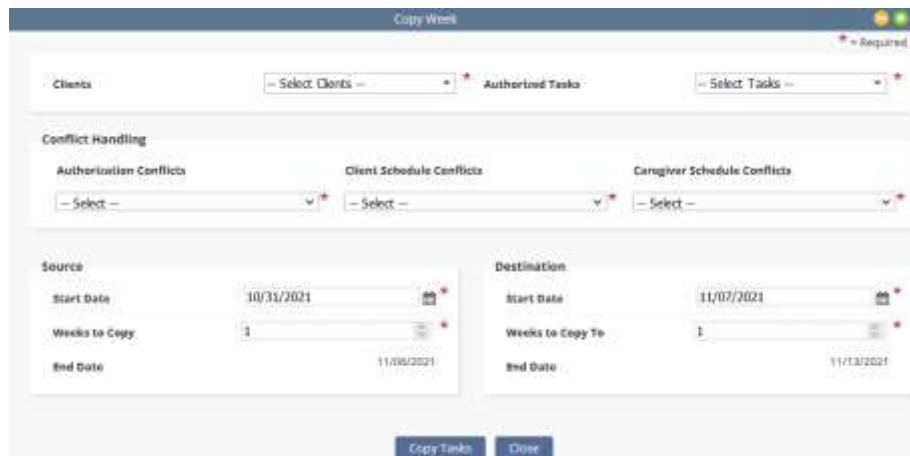
Task/Document	Scheduled Date	Day	Scheduled Time	Status	Client
Skilled Nurse Visit - Mobile	10/25/2021	Monday	N/A	Not Yet Started	BUFFINGTON, LILO
home health aide visit	10/24/2021	Sunday	10:00 AM-04:00 PM	Not Yet Started	ABABA, JESS L.
ASAP HHA visit note	10/23/2021	Saturday	11:00 AM-04:00 PM	Not Yet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

Delete Reassign Email

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	PRIDD, DANE	Custom Visit - Mobile	Dane Ruccio RN	10/26/2021
10/21/2021	PRIDD, DANE	Custom Visit - Mobile	Dane Ruccio RN	10/21/2021
10/22/2021	ARTHUR, SHELBA	Communication Note	Krystal Pana RN	10/22/2021

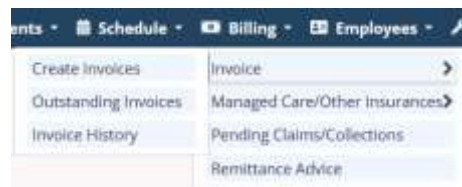
Total: 9

Billing

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



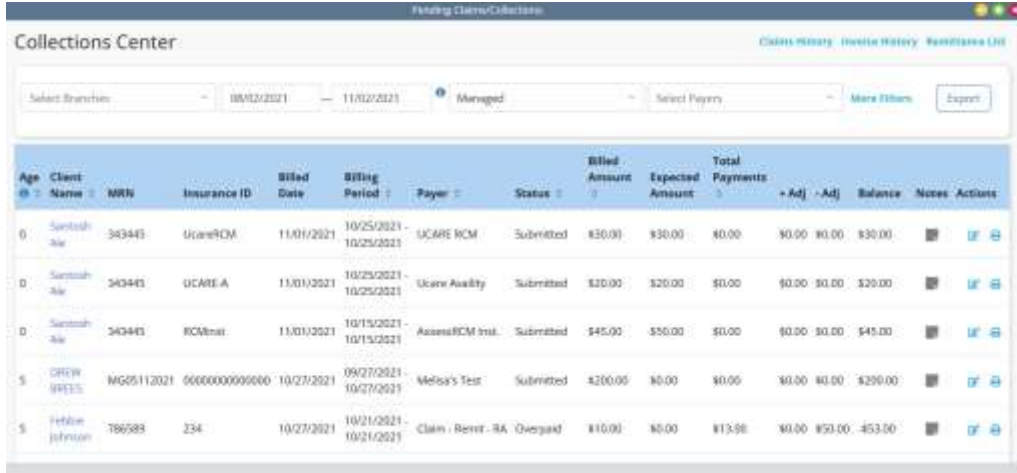
Invoice - Enables a user to create invoices, review outstanding invoices and invoice history for clients on private pay.



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.



Age	Client	Insurance ID	Billed Date	Billing Period	Payer	Status	Billed Amount	Expected Amount	Total Payments	+ Adj	- Adj	Balance	Notes	Actions
0	Samuel's	343443	11/01/2021	10/25/2021 - 10/25/2021	UCARE RCM	Submitted	\$30.00	\$30.00	\$0.00	\$0.00	\$0.00	\$30.00		[Edit] [Delete]
0	Samuel's	343443	11/01/2021	10/25/2021 - 10/25/2021	UCare Ability	Submitted	\$20.00	\$20.00	\$0.00	\$0.00	\$0.00	\$20.00		[Edit] [Delete]
0	Samuel's	343443	11/01/2021	10/15/2021 - 10/15/2021	AssessRCM Inc.	Submitted	\$45.00	\$50.00	\$0.00	\$0.00	\$0.00	\$45.00		[Edit] [Delete]
5	ORCA	MG05112021	06/06/2021	10/27/2021 - 10/27/2021	Melissa's Test	Submitted	\$200.00	\$0.00	\$0.00	\$0.00	\$0.00	\$200.00		[Edit] [Delete]
5	Reflex	786583	234	10/27/2021 - 10/27/2021	Claim - Remit - RA	Overpaid	\$10.00	\$0.00	\$13.98	\$0.00	\$50.00	-453.00		[Edit] [Delete]

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



Check (EFT) Number	Payment Date	Payer	Received Date	Payment Amount	Remaining Balance	Claim Count	Actions
RA0CT27Claim	10/27/2021	Claim - Remit - RA	10/27/2021	\$1,000.00	\$987.00	1	[View Details] [Edit] [Delete]
2342341234	10/27/2021	AA Insurance - ALM	10/27/2021	\$100,000.00	\$100,000.00	1	[View Details] [Edit] [Delete]
Oct21Claim	10/21/2021	Test QA Insurance - RA	10/21/2021	\$100.00	\$95.00	1	[View Details] [Edit] [Delete]
Claim001	10/12/2021	Claims Insurance co	10/12/2021	\$1,500.00	\$1,425.00	2	[View Details] [Edit] [Delete]
Invoice501	10/10/2021	Invoice co2	10/10/2021	\$1,500.00	\$1,500.00	1	[View Details] [Edit] [Delete]
Locator19test	10/03/2021	HCTA Professional - RA	10/03/2021	\$100.00	\$100.00	0	[View Details] [Edit] [Delete]
12345	10/01/2021	FR Claims	10/01/2021	\$100.00	\$100.00	0	[View Details] [Edit] [Delete]
123456	09/27/2021	Melissa's Test	09/27/2021	\$2,000.00	\$1,200.00	4	[View Details] [Edit] [Delete]

Employees

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



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



Employee Center | Axxess Testing Agency

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

Cristhel Abas RN (Female - ID:)

Address: 014 Sambalilo St. Linaoza, Davao City, AL 11111

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

[Change Photo] [Edit] [Status Log(s)]

[Refresh] [Schedule Activity] [Change Status]

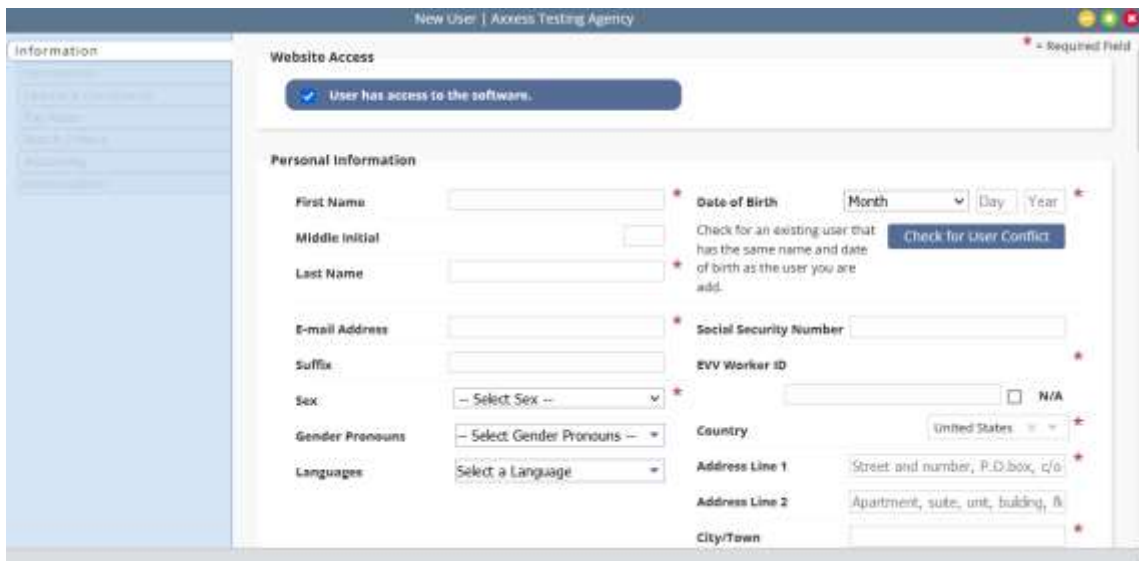
Quick Links: Permissions, Matching, Availability, Licenses, Infectious Disease, Profile, Immunization Profile, Personnel Note

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: | Required Field

Website Access: ☒ User has access to the software.

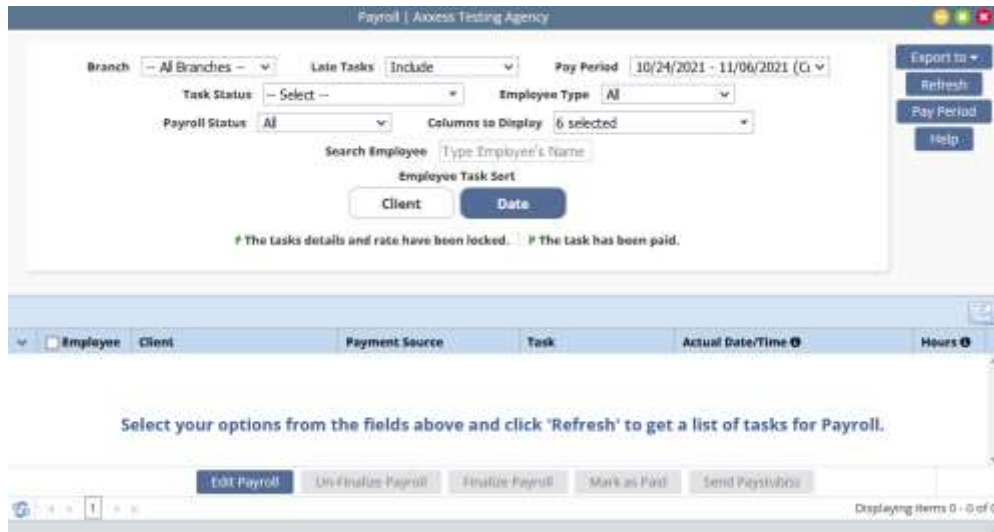
Personal Information:

First Name: | Middle Initial: | Last Name: | Date of Birth: Month | Day | Year | Check for an existing user that has the same name and date of birth as the user you are add. [Check for User Conflict]

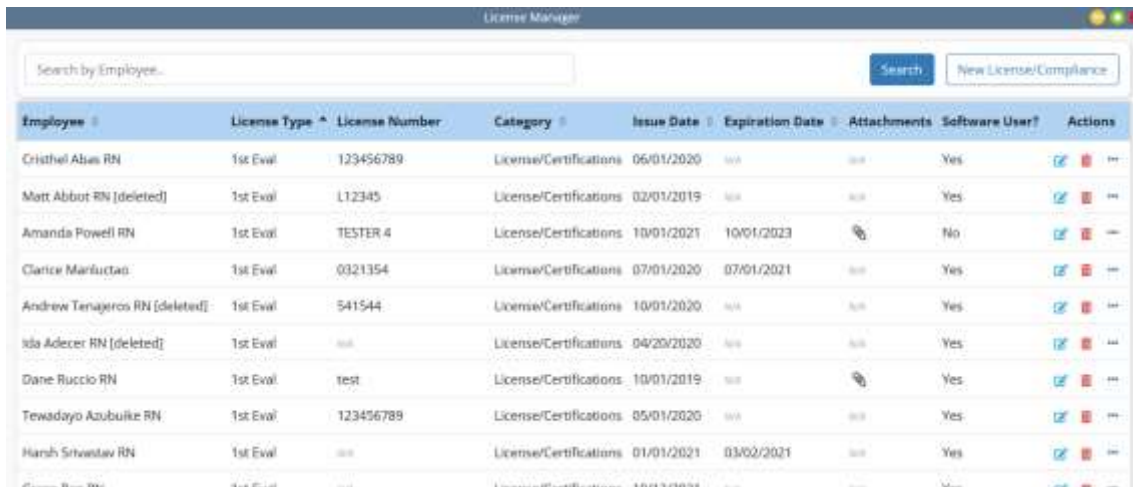
E-mail Address: | Social Security Number: | EVV Worker ID: | Country: United States | Address Line 1: Street and number, P.O. box, c/o | Address Line 2: Apartment, suite, unit, building, fl. | City/Town: |

































Suffix: | Sex: -- Select Sex -- | Gender Pronouns: -- Select Gender Pronouns -- | Languages: Select a Language

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



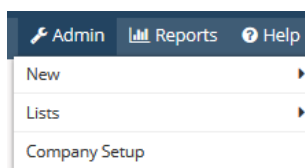
License Manager - Administration of employee licenses are handled from this screen, enabling quick identification of an expiring license.



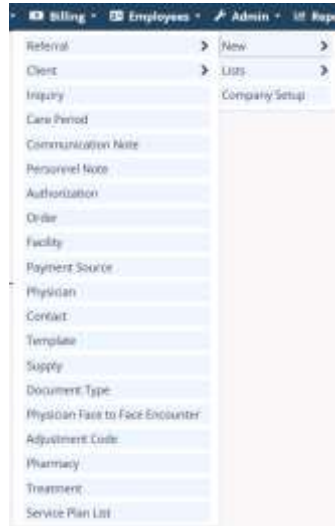
Employee	License Type	License Number	Category	Issue Date	Expiration Date	Attachments	Software User?	Actions
Cristhel Abas RN	1st Eval	123456789	License/Certifications	06/01/2020	10/1	10/1	Yes	  
Matt Abbot RN [deleted]	1st Eval	L12345	License/Certifications	02/01/2019	10/1	10/1	Yes	  
Amanda Powell RN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

Admin

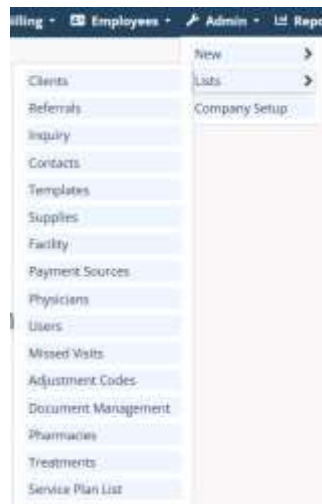
The **Admin** menu enables access to the following actions based on permissions granted to the user. **NOTE: See Admin manual for further details.**



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

Company Name *	Tax ID *	Tax ID Type	CAHPS Vendor
Access Testing Agency	123456789	Ein (Employer Ide...	Delta Satisfaction...
National Provider Number	Medicare Provider Number	Medicaid Provider Number	Unique Agency OASIS ID Code
5834467890	MCAREID1	200037790A	000000000

Contact Person

First Name *	Last Name *	Email *
Anthony	Oshetu	ramakani@axxess.com
Primary Phone		
Home = 1 (878) 787-8787		

[Add Alternate Number](#)

Reports

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

[Reports](#) [Help](#)

- Report Center
- Completed Reports
- EVV Exception Center

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	MONTH-END CLOSE:	Annual Utilization Report (California)
Client Discharge	Claim & Invoice Activity	Discharges By Reason
Client Mail	Month-End AR Report	Electronic Visit Verification Reports
Client Roster	Payment/Adjustment Activity	EDI Export Report (HHAExchange)
Durable Medical Equipment	Schedule Reports	Survey Reports
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.



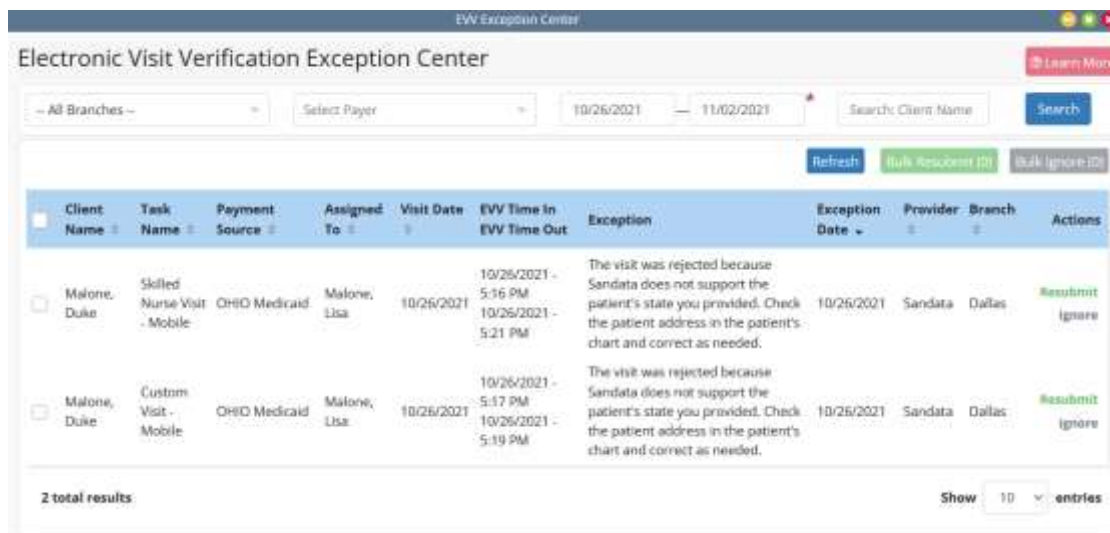
Completed Reports | Axxess Testing Agency

Filter by Text: [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

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



Electronic Visit Verification Exception Center [Learn More](#)

[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.

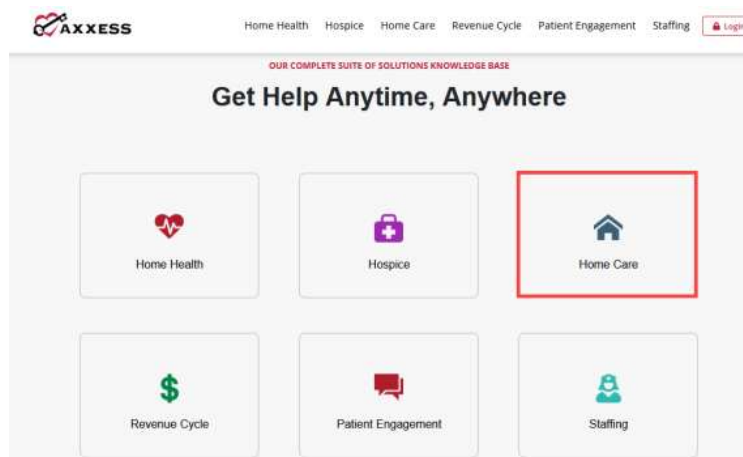


Help
User Community
Help Center
On-Demand Training
Recent Software Updates
Submit a Ticket
COVID-19 Resource Center
Follow Axxess

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

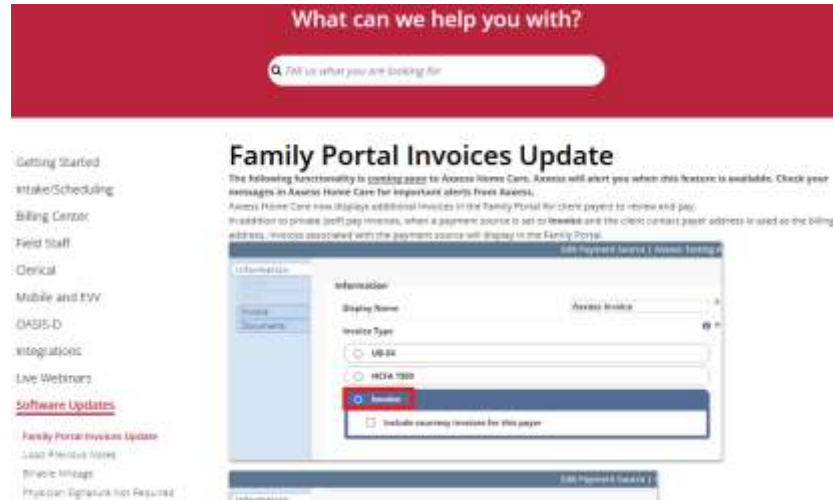


Help Center – A direct link to the Help Center that has answers, articles and videos related to Home Care content.



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

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

Change 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.



Email address

Password

☒ Remember Me
[Forgot your Password?](#)

Secure Login

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 Cj

Login Password

Current Password

New Password

Confirm New Password

Electronic Signature

Current Signature

New Signature

Confirm New Signature

Address

Country

Select Country

Address Line 1

Street and number, P.O. box, c/o

Address Line 2

Apartment, suite, unit, building, floor

City/Town

Postal Code

Primary Phone

Home

1

Enter Phone Number

Add Alternate Number

Fax Number

1

Enter Fax Number

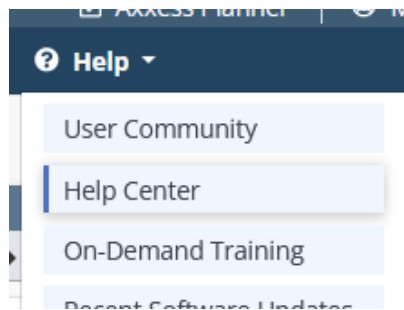
Save

Close

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/>

