

HOME CARE OFFICE STAFF (INTAKE AND SCHEDULING) QUICK REFERENCE GUIDE

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LOGGING IN

1. Go to www.axxess.com and Select **LOGIN**.
2. Enter your username and password. Select **Secure Login**. **NOTE:** If your password is forgotten, select **Forgot your Password** and a link will be sent to the email address used at sign-in.
3. Confirmation Login Successful. Select **OK**.

The Axxess Planner will display. Select the appropriate Axxess application on the left side of the page to perform the Intake and Scheduling process.

DASHBOARD

The dashboard will display six tiles for all users. More permission-based tiles can be added.

1. Welcome Panel - Items for subscribers to Axxess products. These will include items such as important announcements and training videos.
2. My Scheduled Tasks - Electronic “To-Do” list. Users can quickly access a client chart and/or tasks for the first five clients on their to-do list. Select **View All Tasks** to see My Schedule.
3. Messages – The HIPAA-compliant messaging center allows users to communicate in a secure manner. When the user receives messages, notifications will be sent to the user’s email assigned to their account. Select **View All Messages** to go to the Message Center. Select **Compose** to add a message from the tile.
4. News and Updates - Links to Axxess generated blog posts, educational articles, regulatory updates and other important information. Select **View All News and Updates** to view the Axxess Blog.
5. Alerts - Provides direct access to important alerts. Select **View All Alerts** to go to the Alert Center. Select **Mark as Viewed** to remove the alert.
6. Client Birthdays - This is a quick reminder of the clients who will celebrate birthdays in the upcoming week/month. Select the phone number to call directly from the tile.

REFERRAL ENTRY

Create/Referral/Medical Referral

NOTE: Sections with a red asterisk (*) indicates that the information is required to save the page.

Referral Source - Required referral items include:

1. Referral Type - Describes what external entity sent the referral.
2. Referral Date - Enter the date the organization received the referral from the referral source.
3. Referral Start of Care Date - Requested date to begin services.

Non-required items include:

4. Admission Source - Where the client came from (Clinic/Physician, Hospital, SNF, etc.).
5. Admission Type - Choose what type of admission.
6. Marketer - This is an internal user associated to the referral source.

Demographics - Required demographic items include:

1. Enter the name.
2. Enter the country.
3. Enter the address. Select **Validate Address** to confirm the correct address.
4. Choose the branch and phone type.
5. Enter the primary phone.
6. Enter the DOB and select **Check for Client Conflict** to prevent duplicates.
7. Choose the sex.

For Non-Required Items:


1. Choose pay rate municipality.
2. Choose gender pronouns.
3. Enter Medicaid, Alternate Medicaid and Social Security Number.
4. Is client Do Not Resuscitate?
5. Choose marital status.
6. Enter height and weight.
7. Choose services required.
8. Enter the DME needed. Enter additional by selecting **Add Equipment**.
9. Enter physician information. If the physician is not found, select **New Physician** to add to the database (permission-based).
10. Enter emergency contacts.
11. Enter comments or use Load Template for pre-determined options.

Select **Save** (client in pending admission status).

VIEWING EXISTING REFERRALS

View/Lists/Referrals or Clients/Referrals

Add a new referral from here by selecting **New Referral**. Choose from the following options to take action on the referral:

-  - Print a preview of the referral document. This is the client's face sheet, which is only available in this format prior to admitting the client.
- **Edit** – Modify previously entered referral details. If the referral is saved, the user will be presented with the following three options:
 1. **Add Another Client (Medical)**
 2. **Add Another Client (Non-Medical)**
 3. **Go to Client Center**
 - a. If **Go to Client Center** is selected, the Client Center will load with the client's status shown as "Pending."
- **Delete** - Removes the client from the system completely. **NOTE:** Deleting referrals means clients will not be visible in any reports.
- **Admit** - Generates all required information required to admit.
- **Non-Admit** - Removes the client from the list of referrals available for admission.

NON-ADMITTING A REFERRAL

View/Lists/Referrals/Non-Admit or Clients/Referrals/Non-Admit

1. Enter a date.
2. Choose a reason.
3. Enter non-admit comments.
4. Select **Save**.

Non-Admitted clients can be found in *Clients/Non-Admissions*.

ADMITTING A REFERRAL

View/Lists/Referrals/Admit or Clients/Referrals/Admit

The Demographics section will contain all the information entered during the referral process. Below are sections that were not in the referral process that are required to admit the client:

- Record Number - This is an organization created Medical Record Number.

- Case Manager - The individual who will be overseeing the client's case.
- Assign to Clinician - The clinician/case manager that the initial care period and/or face-to-face will be assigned to.
- Care Period Start Date – This may have been entered during the referral process, but the care period start date must be confirmed.
- Emergency Triage - This section enables users to document the process during a state of emergency. Choose the appropriate level and add any additional emergency preparedness information.

The following options are sections that were not available when entering the referral but are not required:

- Pharmacies - Find the patient's pharmacy by typing the name then select the **Add Pharmacy** button. Select the **Delete** hyperlink if the pharmacy listed is not correct. If the pharmacy is not in the system, select the **New Pharmacy** button to add to the database (permission-based).
- Payment Sources - Select **Add Payment Source** to add multiple payer sources. Choose payment source, hierarchy and relationship. Then enter Health Plan ID, Group Name, Group ID, start and end date (if applicable).
- Evacuation - Choose the evacuation zone and enter the address/phone numbers. If the evacuation address is the same as emergency contact, select the checkbox. The emergency contact must be previously entered; otherwise, it will be grayed out.
- Emergency Preparedness Comments - Enter comments related to Emergency Preparedness or select **Load Template** for pre-determined options.
- Contacts - Select the **Edit** or **Delete** hyperlinks to make updates. Select the **Make Primary** hyperlink to make any contact the primary. Select **New Contact** to add additional.
 - First name, last name, relation to referral and primary phone are required. Enter any other information available then select **Add**.
- Comments - Enter comments or select **Load Template** for pre-determined options.

Selecting **Save** will show the following options: **Add Another Client (Medical)**, **Add Another Client (Non-Medical)** or **Go to Client Center**. Selecting **Admit** will move the client to the Client Center with an active status.

INTRODUCTION TO CLIENT CENTER

Clients/Clients Center

Client Center Filters

- Branch - Choose a branch (if there is more than one).
- Status - Choose between Active, Discharge, Pending, Non-Admit or Hospitalized.
- Type - Filter for Medical, Non-Medical or All types of clients. System defaults to "All."
- Filter - Choose a payer.
- Tags - Filtering by the tags the organization is using.
- Find - Search for the client's name, and a list will appear when typing in letters by first or last name.

Client Center Top Menu

Create

- Order - Add a new order. Also found in *Create/Order*.
- Communication Note - Add the communication note to the client's chart.
- Authorization - For clients with insurance payers, which require authorization.
 - Enter the start and end dates.
 - Choose authorized tasks, payment source and status.
 - Enter units.
 - Choose unit types and frequency of units.
 - Enter total units or select **Calculate Total** for the system to calculate based on previous units' information entered.

View Tab

Shows the list of Quick Reports found in the Client Center.

- Client Profile - Client Profile Data Sheet.
- Treatment Profile - Add, print, refresh, reorder, edit, delete and discontinue all the client's treatments.
- Medication Profile - Add, edit, discontinue, delete, print and reorder medications. Run drug interactions and view and sign medication profiles.
- Infectious Disease Profile - Add and view COVID-19 screenings.

- [Immunization Profile](#) - Add, inactivate, decline or delete immunizations.
- [Allergy Profile](#) - Add, edit or delete allergies.
- [Authorization Listing](#) - Search/view/edit existing authorizations and add new ones.
- [Communication Notes](#) - View existing and add new Communication Notes.
- [Orders and Care Plans](#) - Reprint, delete and search for Orders and Care Plans.
- [Vital Signs Chart](#) – Displays the client’s vitals taken from the last seven visits. It can also be viewed in graph view.
- [Seizure Records](#) - List of existing seizure records.
- [eTAR Chart](#) - Displays all recorded treatments given and refused/not given in a daily, weekly or monthly format.
- [Supply Log](#) – Displays the completed supply worksheet addenda within a specific time frame.
- [Vent Flow Sheet](#) - Displays all recorded Ventilator Flow Sheets. Filter, print, edit and/or delete flow sheets.
- [Suction Log](#) – Displays the completed suction log worksheet addenda within a specific time frame.
- [Oxygen Safety Risk](#) – Displays the completed oxygen risk addenda within a specific time frame.
- [Fall Risk](#) – Displays all recorded fall risk assessments.
- [eMAR Chart](#) - (Medical Admissions only) View and edit the client's medication administration record.
- [I&O Logs](#) - Search and view recorded input and output values. Default shows summary.
- [Triage Classification](#) – The client’s Emergency Preparedness information.
- [Infection Log](#) – Displays all recorded infections within a specific time frame.
- [Deleted Tasks/Documents](#) - Any tasks that were removed can be retrieved here (permissions-based).
- [Hospitalization Log](#) – List of the client’s hospitalizations.

Schedule

The Schedule tab has a Schedule Activity option that generates the client’s Schedule Center window.

Documents

The Documents tab has two options available to select:




- New Document: Attach a document to the chart.
- View Documents: View existing uploaded client documents.

Billing

The Billing tab has three options available to select:

- Create a New Invoice from within the Client Chart.
- Invoice History navigates to the client's invoice history page.
- Post and record deposits.

Client Center Client Profile

- Upload a client's picture by selecting **Change Photo**.
- The client's name will be indicated next to the picture. It will be viewed as Last name, First name.
 - Selecting the arrow  next to the client's name will open the Schedule Center.
 - If the client is a Do Not Resuscitate, an indicator  will be visible next to the name.
- **Edit** - Selecting the hyperlink opens the client's chart, which contains the referral and admission details.
- **More** - Selecting the hyperlink shows additional client details.
- **Directions** - Selecting the hyperlink provides turn-by-turn directions to the client's home.
- **Admissions** - The client admission periods are listed. Select the  icon to view more details about that admission period and select the **Edit Care Period** hyperlink to make updates.

Blue Action Buttons

The three action buttons in the middle section of the Client Center include the following functions:

- **Refresh** - Refreshes the screen after making changes.
- **Schedule Activity** - Navigates the user to the Client Schedule for Scheduling.

- **Change Status** - Users can change the status of the client.

Client Center Quick Reports



The list of items under the Quick Reports is also accessible from the **View** tab. Reference the **View** tab section above for details.

Client Center Tasks

The lower section of the client's chart contains a list of scheduled and completed documents.

The list of tasks may be grouped or filtered by task type, discipline or date range.

Additionally, the bottom section includes the following columns:

- Task - Displays the document name. The document name acts as a link to open and complete any task not in a completed status.
- Date, Time In-Out and Assigned To - Scheduled time in-out and field staff the task is assigned to.
- Status - Displays the status of the task.
- Electronic Visit Verification - A house icon provides notification that EVV has occurred for the task.
- Sticky Notes - Yellow sticky notes are notes for a task, blue sticky notes are related to the whole care period, orange sticky notes are notes that are returned for review and red sticky notes show missed visit notes.
-  - Print
-  - Attachments
- Action Column - Contains various action items based on the note's status as well as the user's permissions.
 - Details
 - Reassign
 - Reopen
 - Restore
 - Schedule Comments
 - Missed Visit Form
 - Delete

INTRODUCTION TO THE SCHEDULE CENTER

The Schedule Center is the view of the client's tasks in a calendar format.

Schedule Center Filters

- Branch - Defaults to all branches.
- Status – The client or employee’s status level.
- Type – Distinguishes type of employee or client.
 - Client: Medical, Non-Medical or All (default).
 - Employee: System, Non-System or All (default).
- Payer – Client only search item: Drop-down list of payment sources.
- Tags – Enables filtering by tags the organization is using.
- Find – Search part of the client/employee’s name.

Schedule Center Top Menu

The **Schedule Center** has a list of menus that will help prepare and manage the client’s schedule.

- New – One item available to select, **Client Task**.
- Care Period – An active care period covering the timespan being scheduled is a prerequisite to successfully scheduling any task. Select *Care Period/New Care Period* to add a new care period. Then complete the following information:
 - Care Period Start Date
 - Care Period Length
 - Start of Care
 - Case Manager
 - Primary Physician
 - Comments

Care Period/List Care Periods shows all active and any inactive care periods.

- Task Manager – **Reassign** or **Delete** multiple tasks at the same time.
- Matching – There are two submenus: **Preferences** and **Match Criteria**.
 - Preferences lets users mark a caregiver as oriented, a client favorite or as a do not send.
 - Selecting Match Criteria takes the user to the client’s match criteria in their client file.
- Visit Log – This option to update specific information for billable tasks.
- View Authorization(s) – Quick link to the client’s authorization screen to view/edit or add a new authorization.

- Unassigned Shifts – Displays all the scheduled tasks that have not been assigned to a caregiver.
 - To assign a caregiver, select the day(s) they are confirming, select **Reassign** and choose the caregiver who is accepting the shift(s).
- Schedule Summary – Enables users to see each client’s scheduled hours at a summary level for at-a-glance review and identification of scheduling issues. The summary can be filtered by payment source, tasks and family provider. Tasks can be viewed by month, week or day. The list of tasks will display with the following column headers: Tasks, status, payment source, start and end date/time, assigned to and hours.

Client’s Calendar View

Once a client is selected, the calendar will display.

- View by Month, Week or Day.
- List Tasks - Selecting **List Tasks** displays the client’s schedule in list format. Reference the *List Tasks* section in this manual.
- Schedule Comments - Users can view, add, edit and delete schedule comments by selecting **Schedule Comments** from the Quick Details menu or from the **Actions** column when viewing the Schedule Center in list view.

The color legend is located below the calendar for easy reference:

- **Blue** = Scheduled task.
- **Green** = Completed task.
- **Red** = Missed visit.
- **Peach** = Care Period.
- **Yellow** = Next Care Period
- **Gold** = Unassigned task
- **Orange** = Returned task.
- **Grey** = No Access.
- **Red Border** = Outlined in a red border is unauthorized.

List Task View

Selecting **List Tasks** displays the client’s schedule in list format. Above the List Tasks view, a Menu Bar displays the following:

- Red A - Tasks that do not have authorization.

- Task - The name associated with the service being performed.
- Payment Source - The identified payer of the task.
- Start Time - Scheduled Date and Start Time of the task/shift.
- End Time - Scheduled Date and End Time of the task/shift.
- Employee - The caregiver scheduled to perform the task.
- Status - The status of the task/shift.
- Untitled Columns - Columns without titles.
 - EVV - Permission-based Electronic Visit Verification details.
 - Visit Comments - Notes associated with that task.
 - Care Period Comments - Notes for the Care Period.
 - Missed - Comments related to the reason the task was missed.
 - Returned - Comments related to the reason the task was returned.
 - Print Document - Select this to view the document.
 - Attachments - Task attachments.
- Action Column - The options in this column are permission-based and contingent on the status of the task.
 - Details - Opens the detail page of the task allowing viewing/editing of tasks.
 - Missed Visit Form - Enables documentation of missed visits/shifts.
 - Reassign - Ability to quickly reassign tasks to other users.
 - Delete - Removes the task.
 - Schedule Comments – Add, edit and remove comments related to tasks.

Select **Hide List** to hide the List Task view.

Scheduling Visits to A Client

There are two ways to schedule a task. Selecting the calendar day or by selecting *New/Client Task*. Both paths open the Employee Scheduler window. Selecting the calendar day will prepopulate the date in the new task schedule window. The date will be entered manually when using the New Task route.



Enter the following in the Employee Scheduler window:

1. Choose the Shift Length.
2. Decide whether the task will override the shift length or schedule without time.
3. Enter the from and to dates and times.

4. Choose the payment source and task.
5. Choose the recurrence. It can be done daily, weekly, monthly or flexible.
6. Choose the caregiver/employee.
7. Enter comments.
8. Select **Save & Close** for a single visit or **Save & Add Another** for additional.

Organization Schedule

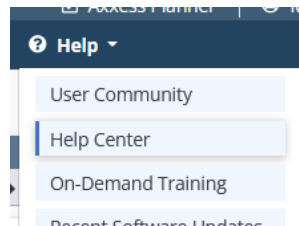
The Organization Schedule shows all visits scheduled to employees of the organization. The functionality is like the Schedule Center, but instead of searching for clients individually, they are all shown in the grid.

- Choose a specific branch (if more than one).
- View by week or day.
- Move through week or day by selecting left and right arrows.
- Print by selecting the  icon.
- Refresh the page by selecting the  icon.
- Schedule defaults to viewing clients but can be changed to users by selecting **Employee**.
- Hover over a scheduled task to see the Quick Details.
 - Select **Message Employee** to message the employee assigned to the task.
 - Select the house icon to view the task's EVV details.
 - Users can view, add, edit and delete schedule comments by selecting **Schedule Comments**.

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/>

