HOSPICE
ORDERS MANAGEMENT
TRAINING MANUAL
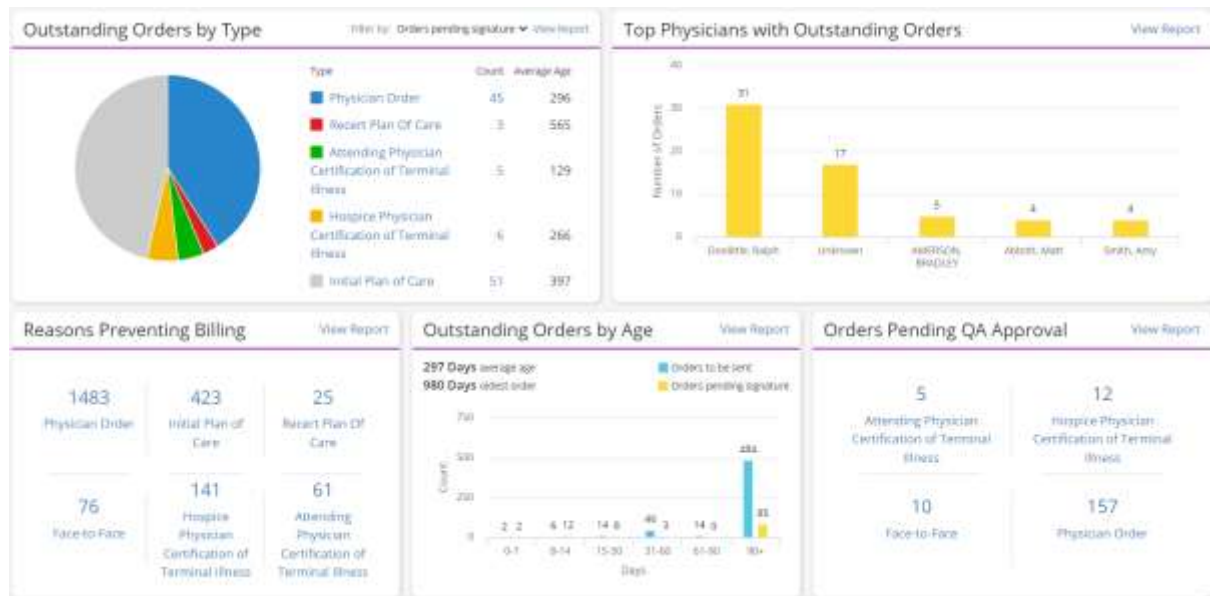March 2022

Table of Contents

/Axxess

ORDERS DASHBOARD
Reports/Orders Dashboard

The Orders Dashboard will show an organization's outstanding physician orders, plans of care, certifications of terminal illness, and face-to-face visit documentation that may be holding up billing. This will help assist organizations to quickly identify issues and resolve them.

Orders Dashboard has five tiles:

1. <u>Reasons Preventing Billing</u> - This tile shows outstanding physician orders, plans of care, certifications of terminal illness, and face-to-face visits for patients who have a claim that cannot be billed due to outstanding documents. By selecting the hyperlink title in each area, the user will be able to go to the **Orders Management** page, which shows the patients (and physicians) who have outstanding documents. Select the **View Report** hyperlink to see the Reasons Preventing Billing report.
2. <u>Outstanding Orders by Age</u> - This tile shows aging orders and allows an organization to see orders that are outstanding. This shows a breakdown of orders that have and have not been sent to the physician for signature. The graph is interactive and when an area is selected, it will take the user to a list showing the orders by age. Select the **View Report** hyperlink to see the Outstanding Orders by Age report.
3. <u>Orders Pending QA Approval</u> - This tile shows the orders and documents awaiting approval by Quality Assurance and are unable to be sent out for

signature. Selecting any of the hyperlinks in this section takes the user to the QA Center to be able to quickly approve the orders, so they are ready to be sent for signature. Select the **View Report** hyperlink to see the Orders Pending QA Approval report.

4. Outstanding Orders by Type - This tile shows the orders and documents that are outstanding by type. It also allows the user to filter by orders that are pending signature and orders that have not yet been sent. The count is a hyperlink that takes the users to an Orders Management list view of only that type of document, so the user can see documents, physicians and age of the outstanding document. Select the **View Report** hyperlink to see the Outstanding Orders by Type report.

5. Top Physicians with Outstanding Orders - This interactive graph allows the user to see the physicians who have the most outstanding orders/documents. It takes the user to the list view of these documents by the physician. Select the **View Report** hyperlink to see the physicians with Outstanding Orders report.

ORDERS MANAGEMENT
Patients/Orders Management

Use the search bar to find a specific order. Filtering is the same for all tabs. Search by patient name, physician, type, order date, age, branch, team or delivery method.

Select the patient hyperlink to go straight to the Patient Chart. Print orders individually by selecting the 🖨 icon under the Action column. Download orders by selecting the 📥 icon.

Orders are split into three tabs:

1. **To Be Sent** - This section shows orders ready to be sent for signature. Orders are displayed by age, patient, team, physician, delivery method, type, date, date approved and order preview.

Select the **Update Delivery Method** hyperlink to change the delivery method. Mark individual orders as sent by selecting the green **Mark as Sent** hype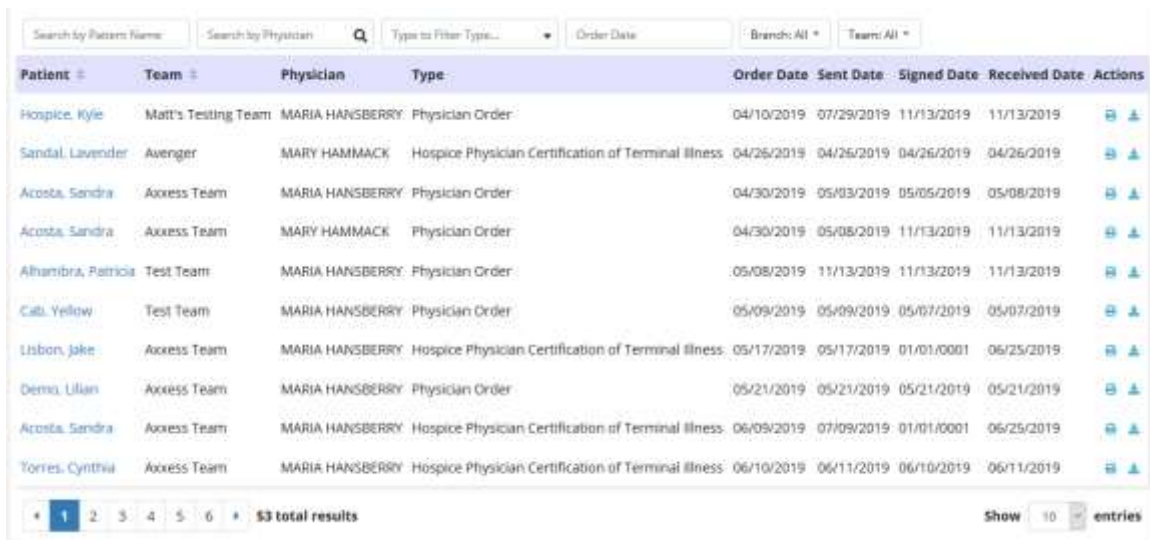rlink or select checkboxes to the left of orders. Then select the **Mark Selected as Sent** button at the top right. The number of orders selected will show on the right side of the button. To select all orders, select the top-left checkbox in the purple header.

2. **Pending Signature** - This section shows orders that have been sent for signature and are expected back. Orders are displayed by age, patient, team, physician, delivery method, type, date, sent date and order preview.

Mark individual orders as received by selecting the green **Mark as Received** hyperlink under the Actions column. The received date populates with the current date. Enter the signed date, then select the **Mark** button.

To change the status of individual orders select the green **Update Status** hyperlink under the Actions column. Change the status in the drop-down menu and select the **Update** button.

To mark multiple orders, select checkboxes to the left of orders, then select the **Mark Selected as Received** button at the top right. The number of orders selected will show on the right side of the button. Select the top-left checkbox in the purple header to select all orders.

To update the status of multiple orders, select the checkboxes to the left of orders, then select the **Update Status** button at the top-right. The number of orders selected will show on the right side of the button. Select the top left checkbox in the purple header to select all orders.

3. **Completed Orders** - This section shows orders that are signed and received. Orders are displayed by patient, team, physician, type, date, sent date, signed and received date.

PHYSICIAN ELECTRONIC SIGNATURES

Physicians and non-physician practitioners can electronically sign orders in Axxess Hospice if they are set up with permissions and a user profile.

To sign orders, navigate to the **Pending Signature** tab. Orders that are ready to be signed will have a **Sign** hyperlink under the Actions column. Select **Sign** to sign an order.

To sign multiple orders at once, select the blue **Bulk Sign** button. Select the orders to be signed and select the **Sign Selected** button to sign the selected orders.

Once signed, orders will appear on the **Completed Orders** tab.

NOTE: Practitioners will only be able to sign orders that are assigned to them.

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 on all our Axxess products. Our Help Center can be accessed by selecting *Help/Help Center* or https://www.axxess.com/help/.